



INDIANA'S FORENSIC TREATMENT PROGRAM

# DARMHA and WITS USER MANUAL

DARMHA Information updated as of December 2019

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## Section 1: DARMHA Enrollment & Usage



## DARMHA Enrollment

### DARMHA Enrollment

All Recovery Works participants MUST first be enrolled in DARMHA (Data Assessment Registry Mental Health and Addiction). Once a participant is enrolled in DARMHA, agencies may bill in WITS (Web Infrastructure for Treatment Services).

1. Go to the DARMHA website. The website address is: <https://dmha.fssa.in.gov/DARMHA>
2. Log in using your unique log in information. If you do not have a DARMHA log in, you will need to turn in a “DARMHA New User Form” to the Recovery Works Staff at [Recovery.Works@fssa.in.gov](mailto:Recovery.Works@fssa.in.gov). The form can be found on at the Recovery Works website, [www.RecoveryWorks.fssa.IN.gov](http://www.RecoveryWorks.fssa.IN.gov). We will confirm that your agency is registered in DARMHA. If your agency is not in DAMRHA, we will work with you to get the “DARMHA Provider Registration Agreement Form” completed.



**DARMHA**  
DATA ASSESSMENT REGISTRY MENTAL HEALTH & ADDICTION

Home  
Documents  
Training  
Login

**Login**

Username:

Password:

☐ Remember username

[Retrieve Password?](#)

## Find or Create Consumer

3. Search for the individual you would like to add. If there is "No Records Found," click "Add New Consumer." If they exist, move to Step Five.

[Home](#)  
[Documents](#)  
[Training](#)  
[Logout](#)  
[Consumer](#) ▶  
[Episodes](#)  
[Reports](#)  
[Import Export](#) ▶  
[BPHC](#) ▶  
[AMHH](#) ▶  
[Admin](#) ▶  
[Admin Contracts](#) ▶  
[Admin Tools/Algos](#) ▶  
[User Profile](#)

User: Katherine Keneipp (DMHA)  
Last Accessed On 10/1/2019 7:00:52 AM

### Consumer Search

Last Name :	<input type="text" value="Rose"/>	Birth Date :	<input type="text" value=""/>
First Name :	<input type="text" value="Poppy"/>	SSN :	<input type="text" value="- - -"/>
Internal ID :	<input type="text" value=""/>	Medicaid # :	<input type="text" value=""/>
DARMHA ID :	<input type="text" value=""/>		

No Records Found!

4. Fill the Consumer page out and click "Insert."

[Home](#)  
[Documents](#)  
[Training](#)  
[Logout](#)  
[Consumer](#) ▶  
[Episodes](#)  
[Reports](#)  
[Import Export](#) ▶  
[BPHC](#) ▶  
[AMHH](#) ▶  
[Admin](#) ▶  
[Admin Contracts](#) ▶  
[Admin Tools/Algos](#) ▶  
[User Profile](#)

User: Katherine Keneipp (DMHA)  
Last Accessed On 10/1/2019 7:00:52 AM

### Add Consumers

First Name:	<input type="text" value="Poppy"/>	Last Name:	<input type="text" value="Rose"/>
Middle Name:	<input type="text" value="Violet"/>	Suffix:	<input type="text" value=""/>
Mom's Maiden:	<input type="text" value="Iris"/>	Birth Date:	<input type="text" value="01/01/1945"/>
Gender at Birth:	<input type="text" value="Female"/>	SSN:	<input type="text" value="103-23-6004"/>
Gender :	<input type="text" value="Female"/>	Medicaid/HIP ID #:	<input type="text" value=""/>
Internal ID:	<input type="text" value=""/>	Ethnicity:	<input type="text" value="Not Hispanic/Latir"/>

Race (Choose all that apply) :

☐ **African American or Black**  
People having origins in any of the Black racial groups of Africa.

☐ **American Indian and Alaska Native**  
People having origins in any of the original peoples of North and South America (including Central America), and who maintain tribal affiliation or community attachment.

☐ **Asian**  
People having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent.

☒ **Caucasian or White**  
People having origins in any of the original peoples of Europe, the Middle East, or North Africa.

☐ **Native Hawaiian and Other Pacific Islander**  
People having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.

☐ **Other Single Race**  
None of the other race categories apply.

What is the consumer's primary language?

Does the consumer understand and communicate proficiently in English? ☐ Yes ☐ No ☒ Not Applicable

For issues, questions or comments about the web application, contact the [HelpDesk](#) or [Support Center](#).  
[darmha@fssa.in.gov](mailto:darmha@fssa.in.gov)  
(317)-232-7925

DARMHA\_QA  
Version 4.5  
Build 4.04

IP: 10.90.14.58

## Create Episode

### 5. Click "Create Episode."

[Home](#)  
[Documents](#)  
[Training](#)  
[Logout](#)  
[Consumer](#) ▶  
[Episodes](#) ▶  
[Reports](#)  
[Import Export](#) ▶  
[BPHC](#) ▶  
[AMHH](#) ▶  
[Admin](#) ▶  
[Admin Contracts](#) ▶  
[Admin Tools/Algos](#) ▶  
[User Profile](#)

User: Katherine Keneipp (DMHA)  
Last Accessed On 10/1/2019 7:00:52 AM

### Consumer View

First Name:	<b>Poppy</b>	Last Name:	<b>Rose</b>
Middle Name:	<b>Violet</b>	Suffix:	
Mom's Maiden:	<b>Iris</b>	Birth Date:	<b>1/1/1945</b>
Gender at Birth:	<b>Female</b>	SSN:	<b>103-23-6004</b>
Gender:	<b>Female</b>	Medicaid/HIP ID #:	
Internal ID:		Ethnicity:	<b>Not Hispanic/Latino</b>
DARMHA ID:	<b>1382860</b>	Registration ID :	<b>630577</b>

Race (Choose all that apply) :

☐ **African American or Black**  
People having origins in any of the Black racial groups of Africa.

☐ **American Indian and Alaska Native**  
People having origins in any of the original peoples of North and South America (including Central America), and who maintain tribal affiliation or community attachment.

☐ **Asian**  
People having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent.

☒ **Caucasian or White**  
People having origins in any of the original peoples of Europe, the Middle East, or North Africa.

☐ **Native Hawaiian and Other Pacific Islander**  
People having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.

☐ **Other Single Race**  
None of the other race categories apply.

What is the consumer's primary language? English

Does the consumer understand and communicate proficiently in English? ☐ Yes ☐ No ☒ Not Applicable

Record was added on 10/1/2019 1:37:01 PM

[Edit Consumer](#) [Create Episode](#) [Add Assessment](#) [Remove Consumer](#) [Back To Search](#)

For issues, questions or comments about the web application, contact the [HelpDesk](#) or [Support Center](#).  
[darmha@fssa.in.gov](mailto:darmha@fssa.in.gov)  
(317)-232-7925

DARMHA\_QA  
Version 4.5

### 6. Fill the Episode page out and click "Insert."

[Home](#)  
[Documents](#)  
[Training](#)  
[Logout](#)  
[Consumer](#) ▶  
[Episodes](#) ▶  
[Reports](#)  
[Import Export](#) ▶  
[BPHC](#) ▶  
[AMHH](#) ▶  
[Admin](#) ▶  
[Admin Contracts](#) ▶  
[Admin Tools/Algos](#) ▶  
[User Profile](#)

User: Katherine Keneipp (DMHA)  
Last Accessed On 10/1/2019 7:00:52 AM

### Episode View - Rose, Poppy

[Episode](#) [Assessment](#) [Encounter](#) [NOMS](#) [EBP](#) [Diagnosis/Agreement](#) [SUD Treatment](#) [MRO](#)

#### Building New Episode:

Internal Episode Code:

Episode Start Date:

Episode End Date:

Episode Status: Consumer in Treatment

DSC Status: DMHA Supported Consumer

Marital Status:	<span>Single</span>	Insurance:	<span>Private Insurance</span>
County:	<span>Boone</span>	Military Service :	<span>No</span>
Zip Code:	<input type="text" value="46077-"/>	Veteran :	<span>No</span>
Disability:	<span>None Known</span>	Deployed :	<span>No</span>
Referral Source:	<span>Individual/Self</span>	Combat :	<span>No</span>
Legal Basis:	<span>Not Applicable</span>	Family Member in Military :	<span>No</span>
Family Size:	<input type="text" value="1"/>	Medicaid/HIP Active?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Family Income:	<input type="text" value="30000"/>	SNAP/Food Stamps?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Prior Substance Abuse Episodes:	<input type="text" value="0"/>	TANF?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Dependent Children?	<input type="radio"/> Yes <input checked="" type="radio"/> No		

[Insert](#) [Cancel](#)

For issues, questions or comments about the web application, contact the [HelpDesk](#) or [Support Center](#).

## Create Assessment

1. Click the tab, Assessment, and click “New.”

2. Fill out the Assessment in “Interview” mode to get all of the questions and answers on the screen. Please remember that the Assessor **must** be ANSA certified and an active user in DARMHA. Begin by Answering the Evidence Based Practice questions and click “Start Assessment.”

3. Move through each Domain and Module answering the assessment questions. When finished, click “Close & Process Assessment.”

Home

Documents

Training

Logout

Consumer

Episodes

Reports

Import Export

BPHC

AMHH

Admin

Admin Contracts

Admin Tools/Algos

User Profile

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(317)-232-7925

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Version 4.5  
Build 4.04

IP: 10.90.14.58  
FSSWEBQ51FW

User: Katherine Keneipp (DMHA)

Last Accessed On 10/1/2019 7:00:52 AM

ANSA Comprehensive (New)

Assessment Format : Data Entry Mode

Key

Life Functioning Domain

Strengths Domain

Cultural Factors Domain

Behavioral Health Needs Domain

Risk Behaviors Domain

Caregiver Needs and Resources Domain

Vocational/Career Module

Developmental Needs Module

Parenting/Caregiver Role Module

Trauma Module

Traumatic Stress Symptoms

Substance Use Module

Suicide Module

Dangerousness Module

Sexually Aggressive Behavior Module

Crime Module

Health Module

CURRENT SUBSTANCE USE

Are you currently pregnant?  Yes No

Alcohol  Yes No

Cocaine/Crack  Yes No

Marijuana/Hashish/Cannabis Oils  Yes No

Heroin, Non-Prescription Methadone, Opiates and Synthetic Opioids (e.g. Oxycontin, Opana, Fentanyl)  Yes No

PCP  Yes No

Methamphetamine  Yes No

Benzodiazepines (e.g. Xanax, Klonopin, Ativan)  Yes No

Barbiturates  Yes No

Inhalants  Yes No

Other  Yes No

Previous

Save Assessment

Close & Process Assessment

Cancel

DARMHA & WITS MANUAL

8 | Page

## Create SUD Admission

1. Select the 'SUD' tab.

The screenshot shows the 'SUD Treatment - Boarman, Angela' interface. The user is Katherine Keneipp (DMHA), last accessed on 8/15/2019 9:24:32 AM. The left sidebar contains links: Home, Documents, Training, Logout, Consumer, Episodes, Reports, and Import Export. The top navigation bar includes tabs: Episode, Assessment, Encounter, NOMS, EBP, Diagnosis/Agreement, **SUD Treatment**, and MRO. Below the tabs is a 'New Admission' button.

2. Select the 'New Admission' button.

The screenshot shows the 'ADMISSION' form within the 'SUD Treatment - Boarman, Angela' interface. The user is Katherine Keneipp (DMHA), last accessed on 8/15/2019 9:24:32 AM. The left sidebar contains links: Home, Documents, Training, Logout, Consumer, Episodes, Reports, Import Export, Manage Documents, and User Profile. The top navigation bar includes tabs: Episode, Assessment, Encounter, NOMS, EBP, Diagnosis/Agreement, **SUD Treatment**, and MRO. The 'ADMISSION' form includes fields for Admission Date, Internal Admission ID, Service Setting Type, Service Setting, Location (Choose..), Primary Diagnosis 1 through 5, Primary Substance, Secondary Substance, Tertiary Substance, Route, Frequency, Age First Used, Is the consumer receiving Medication-Assisted Treatment (MAT)?, If yes, what medication is being prescribed?, If yes, is the prescriber a staff at your organization?, Specialized Treatment, and SOGS. There is also a 'HelpDesk' link and contact information for the Support Center.

3. Fill in the required fields and select the 'Insert Admission' button.

The screenshot shows the 'SUD Treatment - Boarman, Angela' interface with the 'SUD Treatment' tab selected. The user is Katherine Keneipp (DMHA), last accessed on 8/15/2019 2:44:04 PM. The left sidebar contains links: Home, Documents, Training, Logout, Consumer, Episodes, Reports, Import Export, Manage Documents, and User Profile. The top navigation bar includes tabs: Episode, Assessment, Encounter, NOMS, EBP, Diagnosis/Agreement, **SUD Treatment**, and MRO. The 'ADMISSION' form is filled out with the following data:

Admission Date	Service Setting	Location	Discharge Date	Discharge Reason
08/01/2019	REHABILITATION/RESIDENTIAL, LONG TERM (MORE THAN 30 DAYS)	(1-002) DMHA Test Facility 2 - 222 Airport Ct, Indianapolis, IN		

## Create SUD Discharge

1. There will be only one because you can only have one Admission open at a time.

Home Documents Training Logout Consumer Episodes Reports Import Export Manage Documents User Profile

User: Katherine Keneipp (DMHA)  
Last Accessed On 8/15/2019 2:44:04 PM

### SUD Treatment - Boarman, Angela

Episode Assessment Encounter NOMS EBP Diagnosis/Agreement **SUD Treatment** MRO

Admission Date	Service Setting	Location	Discharge Date	Discharge Reason
Select 08/01/2019	REHABILITATION/RESIDENTIAL, LONG TERM (MORE THAN 30 DAYS)	(1-002) DMHA Test Facility 2 - 222 Airport Ct, Indianapolis, IN		

2. Select the open Admission.

Documents Training Logout Consumer Episodes Reports Import Export Manage Documents User Profile

### SUD Treatment - Boarman, Angela

Episode Assessment Encounter NOMS EBP Diagnosis/Agreement **SUD Treatment** MRO

Admission Date	Service Setting	Location	Discharge Date	Discharge Reason
Select 08/01/2019	REHABILITATION/RESIDENTIAL, LONG TERM (MORE THAN 30 DAYS)	(1-002) DMHA Test Facility 2 - 222 Airport Ct, Indianapolis, IN		

Admission

Discharge

View Encounters

#### ADMISSION

Admission Date: 08/01/2019 Admission ID: 10012 Internal Admission ID:

Service Setting Type: REHABILITATION/RESIDENTIAL, LONG TERM (MORE THAN 30 DAYS)

Service Setting Location: (1-002) DMHA Test Facility 2 - 222 Airport Ct, Indianapolis, IN

Primary Diagnosis 1: F10.20 - ALCOHOL USE DISORDER, MODERATE OR SEVERE

Diagnosis 2:

Diagnosis 3:

Diagnosis 4:

Diagnosis 5:

3. Select the 'New Discharge' button at the bottom of the screen.

Employment Status: Unemployed, Looking F Employment Detail: Not Applicable ROLES Score: Not Applicable

Needle Use: No, Consumer has not us Criminal Involvement: 0 Currently Pregnant?: Yes No

Record was added on 8/15/2019 3:28:33 PM

Edit Admission New Discharge Close

Next

4. You will see the Discharge screen.

Home Documents Training Logout Consumer Episodes Reports Import Export Manage Documents User Profile

User: Katherine Keneipp (DMHA)  
Last Accessed On 8/16/2019 10:16:27 AM

### SUD Treatment - Boarman, Angela

Episode Assessment Encounter NOMS EBP Diagnosis/Agreement **SUD Treatment** MRO

	Admission Date	Service Setting	Location	Discharge Date	Discharge Reason
Select	08/01/2019	REHABILITATION/RESIDENTIAL, LONG TERM (MORE THAN 30 DAYS)	(1-002) DMHA Test Facility 2 - 222 Airport Ct, Indianapolis, IN		

Admission Discharge View Encounters

For issues, questions or comments about the web application, contact the HelpDesk or Support Center. darmha@fssa.in.gov (317)-232-7925

DARMHA\_QA

#### DISCHARGE

Discharge Date:

Discharge Reason:

Employment Status:

Employment Detail:

ROLES Score:

Living Arrangement:

Social Support:

Criminal Involvement:

Primary Substance:  Not Applicable

Secondary Substance:  Not Applicable

Tertiary Substance:  Not Applicable

Frequency:  Not Applicable

Frequency:  Not Applicable

Frequency:  Not Applicable

Insert Discharge Cancel

Previous

5. Fill in the required fields and select the 'Insert Discharge' button.

Home Documents Training Logout Consumer Episodes Reports Import Export Manage Documents User Profile

User: Katherine Keneipp (DMHA)  
Last Accessed On 8/16/2019 10:16:27 AM

### SUD Treatment - Boarman, Angela

Episode Assessment Encounter NOMS EBP Diagnosis/Agreement **SUD Treatment** MRO

	Admission Date	Service Setting	Location	Discharge Date	Discharge Reason
Select	08/01/2019	REHABILITATION/RESIDENTIAL, LONG TERM (MORE THAN 30 DAYS)	(1-002) DMHA Test Facility 2 - 222 Airport Ct, Indianapolis, IN	08/02/2019	Terminated by Facility

Admission Discharge View Encounters

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DARMHA\_QA Version 4.5

#### DISCHARGE

SUD Discharge ID: 10

Discharge Date: 08/02/2019

Discharge Reason: Terminated by Facility

Employment Status: Unemployed, Looking For Work

Employment Detail: Not Applicable

ROLES Score: Not Applicable

Living Arrangement: Homeless

Social Support: No attendance in the past month

Criminal Involvement: 0

Primary Substance: Alcohol

Secondary Substance: Not Applicable

Tertiary Substance: Not Applicable

Frequency: Daily

Frequency: Not Applicable

Frequency: Not Applicable

Close Discharge

Previous

6. The Discharge record is now closed and can't be edited.

## Recovery Works Consumer Option

- Go to the Consumer - View (on left side menu). Then click “Edit Consumer.”

Home  
Documents  
Training  
Logout  
Consumer ▶  
Episodes ▶  
Reports  
Import Export ▶  
BPHC ▶  
AMHH ▶  
Admin ▶  
Admin Contracts ▶  
Admin Tools/Algos ▶  
User Profile

For issues, questions or comments about the web application, contact the [HelpDesk](#) or [Support Center](#).  
[darmha@fssa.in.gov](mailto:darmha@fssa.in.gov)  
(317)-232-7925

DARMHA\_QA  
Version 4.5  
Build 4.04

IP: 10.90.14.58  
FSSWEBQ51FW

User: Katherine Keneipp (DMHA)  
Last Accessed On 10/1/2019 7:00:52 AM

### Consumer View

First Name: <b>Poppy</b>	Last Name: <b>Rose</b>
Middle Name: <b>Violet</b>	Suffix:
Mom's Maiden: <b>Iris</b>	Birth Date: <b>1/1/1945</b>
Gender at Birth: <b>Female</b>	SSN: <b>103-23-6004</b>
Gender: <b>Female</b>	Medicaid/HIP ID #:
Internal ID:	Ethnicity: <b>Not Hispanic/Latino</b>
DARMHA ID: <b>1382860</b>	Registration ID : <b>630577</b>

Race (Choose all that apply) :

☐ **African American or Black**  
*People having origins in any of the Black racial groups of Africa.*

☐ **American Indian and Alaska Native**  
*People having origins in any of the original peoples of North and South America (including Central America), and who maintain tribal affiliation or community attachment.*

☐ **Asian**  
*People having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent.*

☒ **Caucasian or White**  
*People having origins in any of the original peoples of Europe, the Middle East, or North Africa.*

☐ **Native Hawaiian and Other Pacific Islander**  
*People having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.*

☐ **Other Single Race**  
*None of the other race categories apply.*

What is the consumer's primary language? English

Does the consumer understand and communicate proficiently in English? ☐ Yes ☐ No ☒ Not Applicable

Record was added on 10/1/2019 1:37:01 PM

Edit Consumer
Create Episode
Add Assessment
Remove Consumer
Back To Search

	Internal Episode #	Episode Start	Episode End	Episode Status	HAP Eligible Dt	HAP Status
<a href="#">Select</a>		1/1/2019		Consumer in Treatment	1/1/2019	DMHA Supported Consumer

- Click the “Recovery Works Consumer” check box. Once the box is checked, the DOC ID field will show up, add the DOC ID if appropriate. Select “Submit to WITS”.

[darmha@fssa.in.gov](mailto:darmha@fssa.in.gov)  
(317)-232-7925

DARMHA\_QA  
Version 4.5  
Build 4.04

IP: 10.90.14.58  
FSSWEBQ51FW

What is the consumer's primary language? English

Does the consumer understand and communicate proficiently in English? ☐ Yes ☐ No ☒ Not Applicable

☒ **Recovery Works Consumer**

Please submit your consumer record to WITS and click Submit button below.

DOC ID #:  Submit to WITS

Update
Cancel

- Once you’ve submitted the participant to WITS, you will then see a message with the WITS unique client number (UCN).

[Support Center.](#)  
[darmha@fssa.in.gov](mailto:darmha@fssa.in.gov)  
(317)-232-7925

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Version 4.5  
Build 4.04  
  
IP: 10.90.14.58  
FSSWEBQ51FW

Does the consumer understand and communicate proficiently in English? ☐ Yes ☐ No ☒ Not Applicable

☒ **Recovery Works Consumer**

*Consumer data has been successfully submitted to WITS (ID:F119504OR064100).*

DOC ID #:

Record last modified on 10/1/2019 2:07:07 PM

Edit Consumer

Create Episode

Add Assessment

Remove Consumer

Back To Search

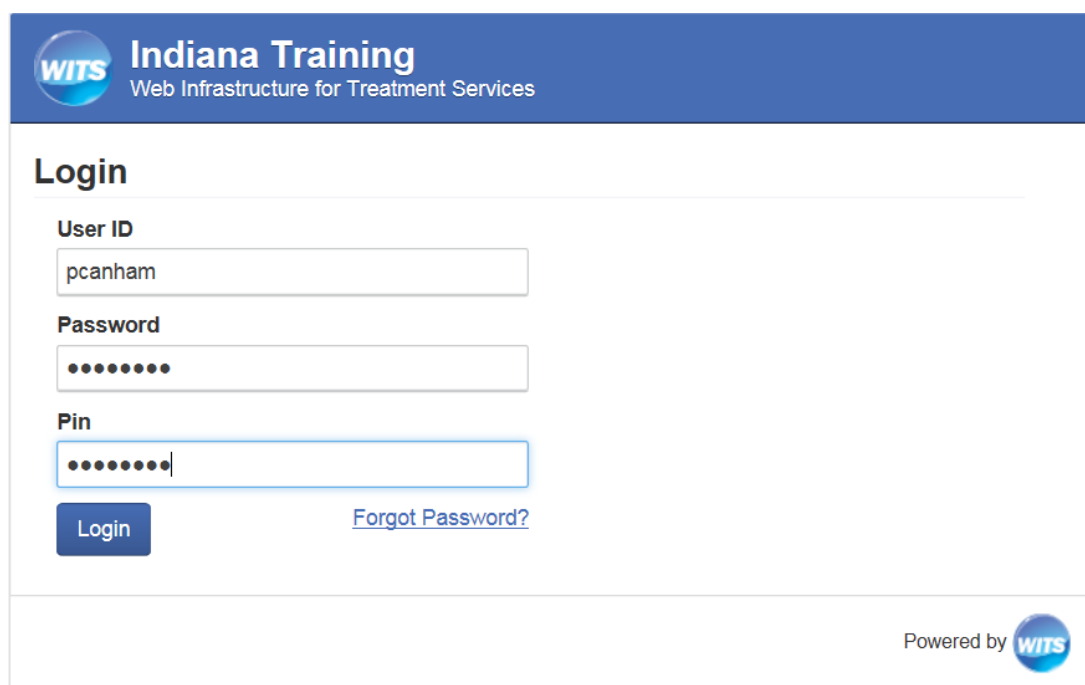
7. Make note of the participant's UCN, as you will need it for the next steps.

## WITS Entry

Once you clicked “Submit to WITS” in DARMHA, the State of Indiana’s Web service began transferring the participant’s information over to WITS. This saves you, as the provider, from the need to enter the same information in both systems. We will begin with logging in to WITS.

## **Logging In To WITS**

1. Go to the WITS website. The website address is: <https://dmha.fssa.in.gov/atr>
2. Log in using your unique log in information. If you do not have a WITS log in, you will need to turn in a “WITS New User Form” to the Recovery Works Staff at [Recovery.Works@fssa.in.gov](mailto:Recovery.Works@fssa.in.gov). The form can be found on at the Recovery Works website, [www.RecoveryWorks.fssa.IN.gov](http://www.RecoveryWorks.fssa.IN.gov). We will confirm that your agency is registered in WITS. If your agency is not in WITS, we will work with you to get you set up.



**WITS** Indiana Training  
Web Infrastructure for Treatment Services

### Login

User ID

Password

Pin

[Forgot Password?](#)

Powered by **WITS**

*Tip: If this is your first time logging into WITS or if your credentials (i.e. Password and Pin) are expired, the system will show the Reset Credential screen to allow you to enter your Password and Pin and to set your security question. Be sure to pick a Password and Pin that can be easily memorized and which is secure. As part of the system security features, you may be asked to change your Password/Pin every few months. Also, if you enter the wrong Password / Pin multiple times your account may be disabled. Contact [Recovery.Works@fssa.in.gov](mailto:Recovery.Works@fssa.in.gov) for assistance.*

## Home Screen

The Home screen is typically the first screen that most providers see when they log into WITS. It provides general information such as announcements, alerts or updates in schedule.

1. The announcement section will have helpful information from the State of Indiana or from agency administrators. Hover your cursor over the pencil icon to click on the **Review** link.
2. Alert List and Scheduler are not being utilized for the Forensic Treatment \ Recovery Works! Process at this time.
3. Providers will use the left navigation to view clients, create encounters and bill for those encounters.

The screenshot shows the WITS Indiana Training Home Screen. At the top, the header includes the WITS logo, 'Indiana Training', a user profile (User: Canham, Patty), location (Location: FTRW Agency, Facility 01), and a Logout button. Below the header, a navigation bar shows the current client (Client: Dancer, Native | M619577AD738100 | 1) and a Clear Client button. A left sidebar (annotated with a blue circle and the number 3) contains links: Home Page, Agency, Client List, System Administration, Reports, and Support Ticket. The main content area is titled 'Home' and contains three sections: 1. **Announcements** (annotated with a blue circle and the number 1): A table with columns for Actions, Summary, Posted Date, Start Date, and Priority. The first row shows an announcement about the Forensic Treatment \ Recovery Works process to Shannon Burnett, posted on 11/25/2015 at 10:20 AM, with a priority of 'H'. A 'Review' button is visible next to the announcement. 2. **Alert List**: A table with columns for Actions, Alert Type, Client Name: ID, Applies To Staff, Message, Facility, and Date Due. 3. **Schedule for**: A section with Start Date (11/25/2015), End Date, Refresh, Search Calendar, and Edit/Add Schedule buttons. Below these sections, a red arrow (annotated with a blue circle and the number 2) points to a detailed view of the announcement. This view shows the 'Summary' (Send questions on the Forensic Treatment \ Recovery Works process to Shannon Burnett) and 'Details' (If you are having an issue, please send a description of the issue, a screenshot, agency name and client UCN to Shannon Burnett). At the bottom, it shows 'Created By' (Canham, Patty) and 'Start Date' (11/25/2015), with a red 'Cancel' button.

WITS Indiana Training

User: Canham, Patty | Location: FTRW Agency, Facility 01

Client: Dancer, Native | M619577AD738100 | 1

Client List

Home Page

Agency

Client List

System Administration

Reports

Support Ticket

Home

Announcements

Actions Summary

Send questions on the Forensic Treatment \ Recovery Works process to Shannon Burnett

Posted Date 11/25/2015 10:20 AM

Start Date 11/25/2015

Priority H

Review

Alert List

Search in Agency

Actions Alert Type Client Name: ID Applies To Staff Message Facility Date Due

Schedule for

Start Date 11/25/2015

End Date

Refresh

Search Calendar

Edit/Add Schedule

Actions Start End Summary Status

Announcements

Summary

Send questions on the Forensic Treatment \ Recovery Works process to Shannon Burnett

Details

If you are having an issue, please send a description of the issue, a screenshot, agency name and client UCN to Shannon Burnett

Created By Canham, Patty

Start Date 11/25/2015

Cancel

## Client Search and Profile

**Overview:** The WITS process always starts with the client you are treating. This section walks you through ways to locate your client and to review the information that was automatically created in WITS from the information you entered in DARMHA

1. To search for a client, click on the **Client List** link in the left navigation menu. A blank **Client List** screen will appear. WITS will search on any fields you fill in, once you click on the **Go** button. The more fields you enter, the fewer records the system will return. Try to use unique information, such as birthdates or social security numbers, if possible.
  - You can also enter a partial name (or other field) followed by a “\*”. This is called a wild card search. For instance, if you search for Last Name of “Smit\*”, you will get people with the last name of “Smith”, “Smitty”, “Smithson”, etc.
  - For date fields – you can use conditional searches such as >01/01/1990. If you key this into the DOB field, it will return clients with a DOB greater than 01/01/1990.
2. Look for your client in the Client List. If you find the right person, pull up the profile by hovering your cursor over the Actions pencil icon and clicking on **Profile** link next to their name. The Unique Client # (UCN) should match the value that is stored in DARMHA.
3. If you do not find your client either by name, another identifier, or the UCN that appeared in DARMHA – please contact the Recovery Works Team via the Recovery Works email, [Recovery.Works@fssa.IN.gov](mailto:Recovery.Works@fssa.IN.gov).

1

Page

Agency

**Client List**

Client Profile

Linked Consents

Activity List

Episode List

System Administration

Reports

Support Ticket

Client Search

Agency FTRW Agency

Facility

First Name

Last Name

SSN

DOB

Indiana Training Client Id

Unique Client Number

Provider Client ID

Treatment Staff

Primary Care Staff

Case Status All Clients

Intake Staff

Other Number

Number Type

Include Only Active Consents Yes

Clear

Go

Client List (Export)


Actions	Unique Client #	Full Name	DOB	SSN	Gender
	M5290331B326100	Biscuit, Sea	5/2/1960	111-22-2333	Male
	M619577AD738100	Dancer, Native	6/1/1985	999-33-3777	Male
			8/30/1981	444-66-6777	Female



Profile

Activity List

Linked Consents

1. The Profile information was created from information that you initially entered into DARMHA.
2. The **Record Created By** field will have the value “Web Provider, DARMHA”. This indicates that the Client Profile was generated from DARMHA information
3. Click the Cancel or Finish button to exit this screen

Location: RW - They got out, They got out 

 **Client:** [REDACTED] | M819208AB808100  Clear Client

---

Profile

First Name

Middle Name

Last Name

Mother's Maiden Name

Suffix

Gender

DOB

SSN

Driver's License

Medicaid #

Has paper file

DARMHA Client ID

Unique Client Number

State Client ID

Record Created By

Last Updated By

Created Date

Last Updated Date

[Residence Zip Code](#)

[REDACTED]

[REDACTED]

[REDACTED]

Male

8/1/1982

310-90-0088

132792

M819208AB808100

Web Provider, DARMHA

Web Provider, DARMHA

12/7/2015 10:21 AM

12/7/2015 10:21 AM

47404

Administrative Actions

Cancel

Save

Finish



## Client Activity List and Creating an Episode

The Client Activity List provides an overview to the entire client's profile, episode (intake), encounter and program enrollment information.

1. After entering your information to DARMHA – the screen below represents what you will initially see in the activity list in WITS. This list will grow as you create the episodes and associated encounters and referrals.
2. Once you have selected your client from the Client list – hover your cursor over the pencil icon or Click on Client List > Activity List from the left navigation to get to this screen.
3. To create an episode for your client, click on the Start New Episode link.
4. You will be presented with the Intake Case Information screen. You will need to complete the following fields, the other required fields are pre-filled by the system:
  - Initial Contact: Select the value most appropriate.
  - Residence: Select the county of residences for the client
  - Intake Date: Will be pre-filled with the date the client was input into DARMHA and pushed to WITS (cannot be more than 14 days from date of DARMHA intake)
  - Referral Source: Will be pre-filled with "Criminal Justice Provider" – select the most appropriate option
  - Intake Staff: Will be pre-filled with the user logged in – select the most provider that did the assessment

5. Click on the **Save** or **Finish** buttons to save your changes

The screenshot displays the WITS interface for a client named Pharoah, American (ID: M619044HP448100). The left navigation menu (callout 2) includes Home Page, Agency, Client List, Client Profile, Linked Consents, Activity List (highlighted), and Episode List. The main area shows the Episode List (callout 1) with a 'Start New Episode' link (callout 3). Below this is the Intake Case Information form (callout 4), which includes fields for Intake Facility (Facility 01), Intake Staff (Canham, Patty), Initial Contact (By Appointment), Residence (Brown), Source of Referral (Criminal Justice Provider), Case # (1), Case Status (Open Active), Initial Contact Date, Intake Date (11/15/2015), Pregnant (No), Prenatal Treatment, HIV Positive, Problem Area, and a checkbox for 'The client has been given a list of providers to choose from?' (Yes). At the bottom, there are buttons for Cancel, Save, and Finish (callout 5), along with a 'Date Closed' field.

6. Click Finish to return to the Client Activity List.
7. Please note that you can now view the entry for the Episode (Intake Transaction) that you just created. You will also see the Client Program Enrollment (Recovery Works) that was automatically created by the system when you saved the Episode (Intake Transaction).

User: Canham, Patty | Location: FTRW Agency, Facility 01 | Snapshot

Client: Pharoah, American | M619044HP448100 | 1 | Clear Client

Home Page

Agency

**Client List**

Client Profile

Linked Consents

**Activity List**

Intake

**Client Activity List**

Actions	Activity	Activity Date	Created Date	Status
	Client Information (Profile)	11/15/2015	12/9/2015	Completed
	Client Program Enrollment (Recovery Works)	7/1/2015	12/9/2015	Completed
	Intake Transaction	11/15/2015	12/9/2015	Completed

**Note: The terms “Episode” and “Intake” are used interchangeably in WITS.**

Business rules to be aware of:

- Client must be enrolled in a Client Program in order to set up vouchers and create encounters. The good news is the system will do this automatically when you create the Episode (Intake).
- The purpose of the Client Program enrollment is to indicate that the client is enrolled in a program to receive services.
- At the time you create and save the Episode (Intake Transaction) the system will also automatically create the Client Group Enrollment (see below).
- The Client Group Enrollment (CGE) defines the payor for the Forensic Treatment / Recovery Works services. This needs to be in place in order to release an encounter to billing. As the payor will always be the State of Indiana, had the ability to automatically create the CGE (means less keying for providers).

Client: Pharoah, American | M619044HP448100 | Clear Client

Home Page

Agency

Client List

**Client Profile**

Alternate Names

Additional Information

Contact Info

Collateral Contacts

Other Numbers

History

**Client Group Enrollment**

Voucher

**Payor List**

[Add Benefit Plan Enrollment](#) [Add Government Contract Enrollment](#)

Actions	Priority	Plan	Group	Contract	Subscriber/ Acct#	Subscriber/ Resp Party	Start Date	End Date
		Recovery Works	Recovery Works	FTRW Agency	M619044HP448100		7/1/2015	

## Creating a Local Voucher for Recovery Works Services

**NOTE:** ONLY Main provider agencies have the ability to create a local voucher in WITS.

The main provider agency needs to establish a local voucher in order to create an encounter for a client. The voucher indicates the services that will be reimbursed by the State of Indiana, and will also inform the provider if the client has reached any client cap max amounts for Recovery Works. Once the local voucher is established and saved the provider can then create associated encounters.

From the above Client Activity List – hover your cursor over the Pencil icon next to the Client Profile and click on the **Review** link. You will be presented with the Client Profile screen and left navigation menu items.

1. Click on Client Profile > Voucher link from the left navigation.
2. You will be presented with the Voucher List screen. Click on the Add New Voucher Record link

User: Coordinator, Casey ▾ | Location: FTRW Agency, Facility 01 ✎

Client: Dancer, Native | M619577AD738100 | 1 ✎ Clear Client

**Profile**

First Name: Native DARMHA Client ID: 123456  
Middle Name: Unique Client Number: M619577AD738100  
Last Name: Dancer State Client ID:  
Mother's Maiden Name: Record Created By: Canham, Patty  
Suffix: Last Updated By: Canham, Patty  
Gender: Male Created Date: 11/24/2015 5:50 PM  
DOB: 6/1/1985 Last Updated Date: 11/24/2015 5:50 PM  
SSN: 999-33-3777 Residence Zip Code: 44444  
Driver's License:  
Medicaid #:

**Voucher List** Add New Voucher Record

Actions	Auth #	Payor	Status	Effective Date	End Date	Authorized	Encumbered	Expended	Available	Last Activity Date

You will be presented with the Voucher screen, with the Vouched Services list.

User: Coordinator, Casey | Location: FTRW Agency, Facility 01 | Snapshot

Client: Dancer, Native | M619577AD738100 | 1 | Clear Client

Home Page
Agency
Client List
Client Profile
Alternate Names
Additional Information
Contact Info
Collateral Contacts
Other Numbers
History
Client Group Enrollment
Voucher
Allergies
Linked Consents
Activity List
Episode List
System Administration

### Voucher

Group Enrollment: Recovery Works | Status: Active

Plan: Recovery Works | Agreement: 10667 - FTRW Agency / 7/1/2015 - 6/30/2016 - Recovery Works-Recovery Works

Voucher: | Date Approved: 11/25/2015

Administering Agency: FTRW Agency | Updated Date: | Updated By: |

Effective Date: 11/25/2015 | End Date: 12/25/2015

Comments:

### Vouched Services List

Actions	Service	Authorized Units	Authorization Amt	Encumbered	Expended	Available Units

[Add Service](#)

Total Vouched: 0.0  
Total Encumbered: 0.0  
Total Expended: 0.0  
Total Available: 0.0

Cancel Save Finish

A number of the Voucher required fields are pre-populated for you.

- The **Agreement** field outlines the dates that can be set on the voucher/authorization.
  - These dates typically represent the State Fiscal Year time period.
  - There may be more than one agreement in place at a time – representing multiple State Fiscal years, click on the down arrow to see multiple values.
  - If you have services that span these time periods – will need to set up separate vouchers.
- The **Effective Date** and **End Date** represent the date range specific to this voucher.
  - Effective Date defaults to the current date.
  - And the End Date defaults to the current date plus 30 days.
  - You may modify these to be consistent with the date range you expect the services to occur.
  - The End Date can be no more than 30 days after the Effective Date.
  - The Effective Date can be no more than 10 calendar days prior to the day you are creating the voucher.
- As you add services to the Voucher, the **Voucher Services** list will populate with that information and the system will calculate totals for the vouched services.
- Click the Save button and then the **Add Service** link to add Services to this voucher

User: Coordinator, Casey | Location: FTRW Agency, Facility 01 | Snapshot

Client: Dancer, Native | M619577AD738100 | 1 | Clear Client

Home Page
Agency
Client List
Client Profile
Alternate Names
Additional Information
Contact Info
Collateral Contacts
Other Numbers
History
Client Group Enrollment
Voucher
Allergies
Linked Consents
Activity List
Episode List
System Administration

### Voucher

Group Enrollment: Recovery Works
Plan: Recovery Works
Voucher:
Administering Agency: FTRW Agency
Effective Date: 11/25/2015
End Date: 12/25/2015
Status: Active
Agreement: 10667 - FTRW Agency
Date Approved: 11/25/2015
Updated Date:
Updated By:

10667 - FTRW Agency
7/1/2015 - 6/30/2016
Recovery Works-Recovery Works

### Vouched Services List

Actions	Service	Authorized Units	Authorization Amt	Encumbered	Expended	Available Units

Total Vouched: 0.0
Total Encumbered: 0.0
Total Expended: 0.0
Total Available: 0.0

Cancel Save Finish

- The **Vouched** service screen allows you to enter the service and # Vouched Units.
- Click on the **Service** down arrow to select the service. If you don't see a service you need – contact the Recovery Works team at [Recovery.Works@fssa.IN.gov](mailto:Recovery.Works@fssa.IN.gov).
- Enter the appropriate number of units in the **# Vouched Units** field.
- Click **Save** or **Finish** button when complete.
- You will be returned to the **Voucher List** screen which has been updated with the information you entered.



Client: Dancer, Native | M619577AD738100 | 1 | Clear Client

5
Vouched

Service: Doing Stuff here
Voucher #: 567
# Vouched Units: 4
# Used Units: 0
Vouched Amount: \$20.00

Cancel Save Finish

10. Note that a number of fields are now grayed out and can no longer be update – also the status of the Voucher is 'Active'.
11. The service you authorized now appears in the Vouched Services List and the calculated fields have been updated.
12. You can keep adding services or click on the Finish button to exit this screen.

 **Client:** Dancer, Native | M619577AD738100 | 1
 
 Clear Client

9
10


**Voucher**

Group Enrollment	Recovery Works	Status	Active
Plan	Recovery Works	Agreement	10667 - FTRW Agency / 7/1/2015 - 6/30/2016 - Recovery Works-Recovery Works
Voucher	567	Date Approved	11/25/2015
Administering Agency	FTRW Agency	Updated Date	11/25/2015 7:50 AM
Effective Date	11/25/2015	Updated By	Coordinator, Casey
End Date	12/25/2015		

Comments

12

**Vouched Services List**
Add Service

Actions	Service	Authorized Units	Authorization Amt	Encumbered	Expended	Available Units
	Doing Stuff here	4	\$20.00	\$0.00	\$0.00	4.00

11

**Actions**
Close

Total Vouched:	\$20.00
Total Encumbered:	\$0.00
Total Expended:	\$0.00
Total Available:	\$20.00

Cancel
Save
Finish

12

#### **Voucher Calculated Field Definitions:**

- **Total Vouched:** Represents the total money amount that has been authorized for this voucher.
- **Total Encumbered:** Represents authorized services where the associated encounter has been released to billing.
- **Total Expended:** Represents authorized services where the associated encounter has been paid (e.g. associated monies have been expended).
- **Total Available:** Represents monies remaining on the voucher that are available for encounters. It is calculated by subtracting Total Encumbered and Total Expended from the Total Vouched amount.

## Encounters and Provider Billing

### To Create Encounters for a Client

1. From the **Client List** screen (menu item on left Navigation), select the client you are working with and click on the corresponding **Activity List** link (click on **Actions** pencil icon)
2. In the Client Activity List screen, search to see if encounter has been entered. You can click on the Review link (with Actions pencil icon) to see encounter details.
3. From the main navigation menu on the left, click on **Activity List > Encounters**, you will be presented with the **Encounter Search** and **Encounter List** screens.

The screenshot illustrates the process of creating encounters for a client through three steps:

**Step 1: Client List Screen**

The top navigation bar shows the user as 'Coordinator, Casey' and the location as 'FTRW Agency, Facility 01'. Below this, the 'Client: Dancer, Native | M619577AD738100 | 1' is displayed. The left sidebar menu has 'Client List' highlighted with a red box and a blue circle containing the number 1. The main area shows a 'Client Search' form with various filters and a 'Client List (Export)' table. The table has columns for 'Actions', 'Unique Client #', 'Full Name', and 'DOB'. The row for 'Dancer, Native' is highlighted, and the 'Activity List' link in the 'Actions' column is highlighted with a red box.

**Step 2: Client Activity List Screen**

A red arrow points from the 'Activity List' link in Step 1 to the 'Client Activity List' screen. The left sidebar menu has 'Activity List' highlighted with a red box and a blue circle containing the number 2. The main area shows a table with columns for 'Actions', 'Activity', and 'Activity Date'. The row for 'Client Information (Profile)' is highlighted, and the 'Review' link in the 'Actions' column is highlighted with a red box.

**Step 3: Encounters Screen**

A red arrow points from the 'Review' link in Step 2 to the 'Encounters' screen. The left sidebar menu has 'Encounters' highlighted with a red box and a blue circle containing the number 3. The main area shows the 'Encounter Search' and 'Encounter List' screens.

4. From the **Encounter List** screen, click on the **Add Encounter** link to create a new Encounter for the client. Proceed to complete the required fields including:
  - a. **Service** – Service you are rendering to the client
  - b. **Program Name** – This is pre-filled.
  - c. **Service Location** – Select appropriate County (where service occurred) value from the drop down menu.
  - d. **Start date** – The date the encounter is rendered as well as the number of units provided
  - e. **Start Time \ End Time** – The start and end times of the rendered service. Entering this information will cause the system to calculate the **Duration**.
  - f. **# of Service Units/Session** – This is limited by the units in the corresponding voucher for this client.
  - g. **Rendering Staff** – Select the provider that provided the service. If the staff member/provider is not listed, please contact the Recovery Works team at [Recovery.Works@fssa.IN.gov](mailto:Recovery.Works@fssa.IN.gov).
5. **Notes** field is to be completed when you are documenting an encounter that was done by an agency you contracted with to do services not available in your agency, or when billing for multiple days of service. Please see the Policies and Procedures Manual for details on billing.

The screenshot shows the 'Encounter Search' and 'Add Encounter' workflow. Callout 4 points to the 'Add Encounter' button in the 'Encounter List' table. Callout 5 points to the 'Service' dropdown in the 'Add Encounter' form. Callout 6 points to the 'Administrative Actions' section at the bottom. Callout 7 points to the 'Notes' text area.

**Client:** Dancer, Native | M619577AD738100 | 1 Clear Client

No results match your search criteria.

**Encounter Search**

Start Date: 11/25/2014 End Date: 11/25/2015

Rendering Staff: Service: Encounter Status: Program: Allow Disclosure of Note:

Clear Go

Actions	Svc Date	Service	ENC ID	Rendering Staff	Program Name	Status

**Encounter**

ENC ID: 155 Created Date: 11/25/2015 9:25 AM

Service: Doing Stuff here

Program Name: Facility 01/Recovery Works : 7/1/2015 -

Service Location: Bartholomew

Start Date: 11/25/2015 End Date: Start Time: 9:00 AM End Time: 10:00 AM

Duration: 60 Min # of Service Units/Sessions: 1

Rendering Staff: Coordinator, Casey

**Notes**

**Administrative Actions**

[Release to Billing](#) [Delete](#)

Cancel Save Finish


**Note:** The service dropdown list only shows services that belong to active vouchers within the current episode. No encounter can be created for services in a closed voucher.

You may not be able to release an encounter to billing if the number of units in the encounter is greater than the voucher available amount, or if you exceed the available yearly cap.

You may create an encounter at any time during the 30-day voucher time frame.

6. Press the **Save** button after entering the encounter
7. If you have the Release to Billing role and the encounter is ready to be billed, you will see the **Release to Billing** link in the Administrative actions. Click on that link to release the encounter to billing.
8. Notice that the encounter you have just created appears in the list, and its status is **Released**. To see the details of the encounter simply click on the Actions pencil icon next to the encounter.
  - For encounters that have not been released to billing, you can review, delete or release to billing. You would use the delete to erase an unbilled encounter that had been created by mistake. Delete and Release to Billing functions are available only to staff that have been set up with the appropriate role.
  - For encounters that have been released to billing, you can review.

 **Client:** Dancer, Native | M619577AD738100 | 1  Clear Client

 This encounter has been released and should not be edited. 

#### Encounter Search



Start Date	<input type="text" value="11/25/2014"/>	End Date	<input type="text" value="11/25/2015"/>
Rendering Staff	<input type="text"/>	Service	<input type="text"/>
Encounter Status	<input type="text"/>	Program	<input type="text"/>
Allow Disclosure of Note	<input type="text"/>		

Clear

Go

#### Encounter List [\(Export\)](#)

[Add Encounter](#)

Actions	Svc Date	Service	ENC ID	Rendering Staff	Program Name	Status
	11/25/2015	Doing Stuff here	155	Coordinator, Casey	Recovery Works	Released
						

Review

## Closing a Voucher

**Note: ONLY Main provider agencies have the ability to close a local voucher in WITS.**

WITS has a process to automatically close a voucher. Providers should do this when services have been completed so that any monies that have not been used are returned to the general Recovery Works fund for use for other clients. We ask that prior to opening a new Voucher, you close out previous vouchers.

1. Need to be in the context of the client whose voucher needs to be closed. From the left navigation, client on Client List > Client Profile > Voucher.
2. From the Voucher List screen – select the Voucher to be closed.
3. Notice that prior to closing this voucher - \$900 had been authorized but only \$750 had been expended when the provider determined that all services were complete.
4. Click on the Close link in the Administrative Actions section
5. You will receive a prompt asking if you are sure you want to close the voucher. Click on the Yes button
6. The screen will reload with the updated closed voucher.
7. The Status has been changed to Close
8. The Authorized amount has been changed to \$750 which matches the \$750 expended. The additional \$150 has been returned to the Recovery Works fund to be used for other clients.

**Step 1:** Select 'Voucher' in the left navigation menu.

**Step 2:** Select the voucher to be closed.

**Step 3:** Notice that prior to closing this voucher - \$900 had been authorized but only \$750 had been expended when the provider determined that all services were complete.

**Step 4:** Click on the Close link in the Administrative Actions section.

**Step 5:** You will receive a prompt asking if you are sure you want to close the voucher. Click on the Yes button.

**Step 6:** The screen will reload with the updated closed voucher.

**Step 7:** The Status has been changed to Close.

**Step 8:** The Authorized amount has been changed to \$750 which matches the \$750 expended. The additional \$150 has been returned to the Recovery Works fund to be used for other clients.

Service	Authorized Units	Authorization Amt	Encumbered	Expended	Available
skNewService7	90	\$900.00	\$150.00	\$750.00	40.00

Total Vouched:	\$900.00
Total Encumbered:	\$0.00
Total Expended:	\$750.00
Total Available:	\$150.00

Field	Value
Status	Closed
Authorization Amt	\$750.00

Service	Authorized Units	Authorization Amt	Encumbered	Expended
skNewService7	90	\$750.00	\$0.00	\$750.00

Total Vouched:	\$750.00
Total Encumbered:	\$0.00
Total Expended:	\$750.00
Total Available:	\$0.00

## **Consent, Referral, and Referred Vouchers**

This section reviews setting up the consent policy that may be established by the main provider agency. It is not a required process – but provides a mechanism for the main provider agency to standardize their consent \ referral process and to save a few keystrokes.

This section also covers what is needed for a main agency to create a consent, have the client sign it, create the referral and create a referred voucher.

WITS allows client information to be consented or “shared electronically” within the system. The way in which this is accomplished is through the use of creating a consent record at the individual client level. This means each time a staff wants to share information, a consent record is created. It can be a very repetitive process to continue to create these consent records on a client-by-client basis.

To help users create consistent Consent records, each Agency should set up its own Agency Disclosure. This establishes a template for Consent. A global disclosure policy can be created for all agencies, or a separate disclosure agreement can be created for each agency.

### **Defining the consent policy via Agency Disclosure (done by Sending Agency, usually only needed one time for all consents).**

It is expected that an agency will need to disclose information to another agency, after obtaining consent from the client. In order to do this – need to capture disclosure agreements from the disclosing agency to other agencies. Normally – this only needs to be set up one time for the disclosing agency.

1. Click on the **Agency > Agency List > Relationship > Disclosure** link in the left Navigation menu.
2. From the **Agency Disclosure Domain List** screen, click on the link called **Add Agency Disclosure Domain Record**.
3. When the Agency Disclosure Domain screen appears, select the “Disclosing Agency” and the “Receiving Agency” from the drop down lists.
  - The “Disclosing Agency” should always be the sending agency.
  - The “Receiving Agency” can be set to “Global Policy or Non System...” and thus can be used for any consent to any other agency in WITS.
  - Set “Global Policy? (Available To All Agencies)” to “Yes”
4. Determine if Consent should be verified. If yes, then set the “Always Verify Consent?” field to “Yes”.
5. In the Disclosure Domain Selection section:
  - a. Expiration Type should be “Discharge”
  - b. +Days should be set at 90
  - c. Then select **all** the Consent Options and move them to the Selected Options box using the arrows. The State has a business rule that all Consent options must be selected – setting up this template one time will save the clinician keystrokes when creating the client consent. This acts as a template for your agency’s consents.
6. When complete, click on the **Finish** button to complete and save the disclosure record.

User: Canham, Patty | Location: FTRW Agency, Facility 01 | Snapshot

Client: Biscuit, Sea | M529033IB326100 | 1 | Clear Client

Home Page

- Agency
  - Agency List
  - Agency Profile
  - Contacts
  - Relationships
    - Collaborative
    - Disclosure

Agency Disclosure Domain List

Agency Name: FTRW Agency

Actions: Consents Granted By

Consents Granted To

Agency Disclosure Domain

Disclosing Agency: FTRW Agency

Receiving Agency: Global Policy or Non Syst...

Receiving Entity(Non System Agency):

Global Policy? (Available To All Agencies): Yes

Always Verify Consent?: Yes

Disclosure Domain Selection

Client Information To Be Consented

Expiration Type: Date Signed(DS) + Days

\*Expiration type is required for disclosure activities.

Consent Options

Selected Options

- ANSA Assessment (DS, +90)
- AUDIT Screen (DS, +90)
- Case Notes (DS, +90)
- Client Information (Profile) (DS, +90)
- Client Log (DS, +90)
- Consent (DS, +90)

Comments

This disclosure document sets up the general template for all client consents documented by this agency.

Cancel Save Finish

**Creating the consent.** This has to be done for each client where information is to be shared, use the client list navigation to select the client who needs a consent created.

- Using the left hand menu, navigate to the **Client > Activity List > Consent** menu item, and click the **Add New Client Consent Record** link.
- Fill in the appropriate fields on the consent form.
  - Entities with Disclosure Agreements: "All Other Agencies"
  - System Agency will be prepopulated to Yes
  - Disclosed to Agency: this is where you will choose the agency that you are sharing client information with
  - Facility will pre-populate
  - Purpose of Disclosure: type in most appropriate reason (ex: services unavailable)
  - Earliest Date of Services to be consented: may be today or any prior date
  - Has the client signed the paper agreement form: this is asking whether or not the client has signed a release of information within your agency in order to share information with the other agency. Please include the date the ROI was signed.
- The Client Information to Be Consented will be pre-populated based on the actions taken during the directions in the previous section (page 39)/
- The Client information options may be changed by using the < and > arrows to move items. You must select **all** the options in order to save the consent.

- Once you change the “Has the client signed the paper agreement form” to “Yes” and save – the Disclosure agreement can only be Revoked, it can’t be modified.
- Click on the Save button (do not hit Finish).

The screenshot shows the 'Client Consent List' interface. At the top, a client record is displayed: 'Client: Biscuit, Sea | M529033IB326100 | 1' with a 'Clear Client' button. Below this is a table with columns: Actions, Start Date, Disclosed To, Status, and Signed?. A red box and callout '1' highlight the 'Add New Client Consent Record' button in the top right corner of the table.

On the left, a navigation menu is shown with a red box and callout '1' around the 'Consent' link under the 'Activity List' section.

The 'Client Disclosure Agreement' form is displayed below the table. It includes a note: 'Note: Consented information may not be redisclosed.' and client details: 'Client Name: Biscuit, Sea', 'Unique Client Number: M529033IB326100', and 'Disclosed From Agency: FTRW Agency'. The form has several dropdown menus and checkboxes, including 'System Agency' (Yes), 'Disclosed To Agency' (RW - They got out), 'Facility' (All Facilities), 'Purpose for disclosure' (Additional Services), 'Earliest date of services to be consented' (1/1/2015), and 'Has the client signed the paper agreement form' (Yes). A red box and callout '2' highlight the 'Date client signed consent' field, which is set to 1/5/2015.

Below the form is a section titled 'Client Information To Be Consented'. It includes an 'Expiration Type' dropdown set to 'Date Signed(DS)' with a '+ Days 90' field. A note states: '\*Expiration type is required for disclosure activities.' There are two lists: 'Client Information Options' (ANSA Assessment, AUDIT Screen, Case Notes, Client Log, DAST-10 Screen, Demographic Data, Diagnosis List, GPRA Interview, Individualized Recovery Plan, Medication Summary, PHQ-9 Screen) and 'Disclosure Selection' (Client Information (Profile) (DS, +), Consent (DS, +90)). A red box and callout '3' highlight the 'Disclosure Selection' list.

At the bottom, there is a 'Comments' field with a red box and callout '1' around it, containing the text: 'This disclosure document sets up the general template for all client consents documented by this agency.' There is also an 'Other Disclosures' field. At the very bottom are three buttons: 'Cancel', 'Save', and 'Finish'.

- Note the Revoke button that appears on the Disclosure, once the Agreement has been marked as being signed by the client.
- Once saved, you will see a link to ‘Create Referral Using this Disclosure Agreement’. Click on that link to create a referral to the provider agency that was referenced in the Disclosure.

Client: Biscuit, Sea | M529033IB326100 | 1 Clear Client

---

Client Disclosure Agreement

Create Referral Using this Disclosure Agreement

Note: Consented information may not be redisclosed.

Client Name: Biscuit, Sea

Unique Client Number: M529033IB326100

Disclosed From Agency: FTRW Agency

Entities with Disclosure Agreements RW - They got out

System Agency Yes

Disclosed To Agency RW - They got out

Disclosed To Entity (Non System Agency)

Purpose for disclosure Additional Services

Facility All Facilities

Earliest date of services to be consented 1/15/2015

Has the client signed the paper agreement form Yes Date client signed consent 12/11/2015

Client Information To Be Consented

Expiration Type

\*Expiration type is required for disclosure activities.

Client Information Options

Disclosure Selection

ANSA Assessment (DS, 3/10/2016)  
AUDIT Screen (DS, 3/10/2016)  
Case Notes (DS, 3/10/2016)  
Client Information (Profile) (DS, 3/10/2016)  
Client Log (DS, 3/10/2016)  
Consent (DS, 3/10/2016)  
DAST-10 Screen (DS, 3/10/2016)  
Demographic Data (DS, 3/10/2016)  
Diagnosis List (DS, 3/10/2016)  
GPRA Interview (DS, 3/10/2016)  
Individualized Recovery Plan (DS, 3/10/2016)

Comments

Other Disclosures

Finish Revoke

8. To Complete the Referral - Choose a reason for the referral from the dropdown menu.
9. Choose the facility and program to which you are referring.
10. The fields "Is consent verification required" and "Is consent verified" should be set to YES.  
"Continue this episode of care" should be set to NO.
11. DO NOT change the referral status. This should remain "Referral Created/Pending".
12. Save the Referral. A new menu item "Authorizations" will appear under the Referrals menu link if you have the role/key activity to create referred vouchers.

Client: Biscuit, Sea | M529033IB326100 | 1

Clear Client

Home Page

Agency

Client List

Client Profile

Linked Consents

Activity List

Intake

Program Enrollment

Encounters

Consent

Referrals

Authorization

Episode List

System Administration

Reports

Support Ticket

Referral

Referred By

Agency

FTRW Agency

Facility

Facility 01

Staff Member

Canham, Patty

Program

Facility 01/Recovery Works : 7/1/2015 -

State Reporting Category

Reason

Service not available at this facility

If Other

Is Consent Verification Required?

Yes

Is Consent Verified?

Yes

Continue This Episode of Care?

No

Comments

Referral Status

Referral Created/Pending

Referral Date

11/1/2015

Projected End Date

Created Date

12/11/2015 11:11 AM

Referred To

Signed Consents

RW - They got out

Agency

RW - They got out

Facility

They got out

Staff Member

Program

Recovery Works (NA)

State Reporting Category

Non-System Agency

Non-System Modality

Non-System Specifier

Appt Date

Undetermined

Consents Granted

Consent Date: 1/15/2015

Disclosure Domains:

AUDIT Screen (DS, 3/10/2016)

ANSA Assessment (DS, 3/10/2016)

Client Information (Profile) (DS, 3/10/2016)

Consent (DS, 3/10/2016)

Cancel

Save

Finish

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13. Click the “Authorizations” Menu item, then click “Add New Voucher” from the list screen.
14. Choose the payor Plan – should be “Recovery Works”. This will correspond to plans available to the provider to which you are referring.
15. Next, choose the Contract tier – typically these represent various State Fiscal Years. .
16. The effective date will populate with today’s date; the end date will populate with the end date of the authorization period.
17. **IMPORTANT NOTE: Effective Date and End Date of Authorization must fall within the dates on the contract (outlined in red). Vouchers may not extend beyond the dates of the authorization period on the agreement.**
18. Click on the SAVE button, then click on the Add Service link.

Client: Biscuit, Sea | M529033IB326100 | 1 Clear Client

Home Page

Agency

Client List

Client Profile

Linked Consents

Activity List

Intake

Program Enrollment

Encounters

Consent

Referrals

Episode List

System Administration

Reports

Support Ticket

Referral

Referred By

Agency: FTRW Agency

Facility: Facility 01

Staff Member: Canham, Patty

Program: Facility 01/Recovery Works : 7/1/2015 -

State Reporting Category:

Reason: Service not available at this facility

If Other:

Is Consent Verification Required? Yes

Is Consent Verified? Yes

Continue This Episode of Care? No

Comments:

Referral Status: Referral Created/Pending

Referral Date: 11/11/2015

Projected End Date:

Created Date: 12/11/2015 11:11 AM

Referred To

Signed Consents: RW - They got out

Agency: RW - They got out

Facility: They got out

Staff Member:

Program: Recovery Works (NA)

State Reporting Category:

Non-System Agency:

Non-System Modality:

Non-System Specifier:

Appt Date: Undetermined

Consents Granted

Consent Date: 1/15/2015

Disclosure Domains:

AUDIT Screen (DS, 3/10/2016)

ANSA Assessment (DS, 3/10/2016)

Client Information (Profile) (DS, 3/10/2016)

Consent (DS, 3/10/2016)

Cancel Save Finish

Client: Biscuit, Sea | M529033IB326100 | 1

Clear Client

Home Page

Agency

Client List

Client Profile

Linked Consents

Activity List

Intake

Program Enrollment

Encounters

Consent

Referrals

Authorizations

Episode List

Authorization List

Add New Authorization Record

Actions	Auth #	Payer	Status	Effective Date	End Date	Encumbered	Expended	Available	Last Activity Date

Client: Biscuit, Sea | M529033IB326100 | 1

Clear Client

Authorization

Group Enrollment

Plan

Authorization #

Administering Agency

Effective Date

End Date

Pending

0000055555 - RW - They got out / 11/1/2015 - 12/31/2019

Recovery Works-Recovery Works

569

FTRW Agency

11/15/2015

12/15/2015

Date Approved

Updated Date

Updated By

12/11/2015

12/11/2015 11:32 AM

Canham, Patty

Comments

Authorized Services List

Add Service

Actions	Service	Authorized Units	Authorization Amt	Encumbered	Expended	Available Units

Actions

Delete

Total Authorized:

\$0.00

Total Encumbered:

\$0.00

Total Expended:

\$0.00

Total Available:

\$0.00

Cancel



Save

Finish


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19. After clicking on the “Add Service”, you will be presented with the **Authorized Services** screen.
20. Choose the service from the dropdown. Services have been defined by the State of Indiana.
21. IMPORTANT NOTES:
- a. The services available will correspond to the services approved through the Agreement Service Rates for this Provider.
  - b. If using Parent/child categories, choose the PARENT on the Authorization. The “child” services will be chosen by the provider on the encounter record.
  - c. Select the authorized units.
  - d. “Used Units” is available in the event an authorization already existed, and some units have been used prior to entering this authorization in the system.
  - e. Please note that all Client Caps and Client Service caps will be enforced at this point. You will not be allowed to save the Authorization if the amount of money (units times the rate established in Agreement Service Rates) exceeds any of those caps.
  - f. You also will not be able to save the Authorization if the dollar amount of the Authorization will exceed the Allocated amount in the Plan Period Authorization Budget.
  - g. WITS authorizes dollars, not units. Units are used to help determine the number of sessions or services that will be offered to the client; however, all caps and the amount of the actual Authorization are enforced in dollars.
22. Clicking the **Finish** button will return you to the Voucher, where you will see the service you just added. You may either edit it, or add a new service.

 **Client:** Biscuit, Sea | M529033IB326100 | 1  Clear Client

**Authorized Services** 2

Service	Doing stuff elsewhere	2	
Authorization #	569		
# Authorized Units	10		
# Used Units	0		

Cancel

Save

Finish

 2

23. Notice that the voucher you created is in a Pending Status.
24. The System calculated fields at the bottom indicate the monies that have been authorized.
25. You have the option to add more services to the voucher if needed.
26. Click the **Finish** button once you have completed the voucher.

Client: Biscuit, Sea | M529033IB326100 | 1 [Clear Client](#)

### Authorization

Group Enrollment:   
 Plan: Recovery Works  
 Authorization #: 569  
 Administering Agency: FTRW Agency  
 Effective Date: 11/15/2015   
 End Date: 12/15/2015

Status: Pending  
 Contract: 0000055555 - RW - They got out / 11/1/2015 - 12/31/2019 - Recovery Works-Recovery Works  
 Date Approved: 12/11/2015  
 Updated Date: 12/11/2015 11:32 AM  
 Updated By: Canham, Patty

Comments:

### Authorized Services List

[Add Service](#)

Actions	Service	Authorized Units	Authorization Amt	Encumbered	Expended	Available Units
	Doing stuff elsewhere	10	\$100.00	\$0.00	\$0.00	10.00

Actions:   
[Delete](#)

Total Authorized: \$100.00  
 Total Encumbered: \$0.00  
 Total Expended: \$0.00  
 Total Available: \$100.00

[Cancel](#) [Save](#) [Finish](#)

## Accepting Referrals and Authorizations

Providers are notified of pending referrals at the top of the home screen. In addition, they may set up alerts to notify them of referrals received.

Providers navigate to the Agency - > Referrals In screen to accept referrals. They can view the services authorized by reviewing the referral from the Referrals In screen, then selecting the Vouchers menu item that appears below the Referrals In menu item from the left hand navigation.

User: Canham, Patty | Location: SAT Patty2, Facility 01

Home Page | Agency | Group List | Client List

There is currently 1 person that has been referred in.

Home

Announcements

Actions Summary Posted Date

User: Canham, Patty | Location: SAT Patty2, Facility 01 Snapshot

Referrals for Facility 01 (Export)

Referral Status Codes: Placed/Accepted, Referral Created/Pending, Referral Terminated, Refused Treatment

Search Criteria: Unique Client Number, Created Date, Referred Date, First Name, Last Name

Clear Go

Actions	Unique Client #	Client Name	DOB	Created Date	Referring Agency/Facility	Referred To Modality	Referral Status	Ref to Facility	Referral Comments
	M459299IB998110	Binks, Jar Jar	4/15/1982	11/19/2014	SAT Patty/Pattys Facility	Ambulatory- Non-Intensive Outpatient	Placed/Accepted	Facility 01	
	M569099ME995110	Emporer, Crazy	5/16/1950	11/20/2014	SAT Patty/Pattys Facility	Detoxification, 24-Hour Service, Hospital Inpatient	Placed/Accepted	Facility 01	
	M159599AV998110	Vader, Darth	1/15/1985	12/17/2014	SAT Patty/Pattys Facility	Ambulatory- Non-Intensive Outpatient	Referral Created/Pending	Facility 01	

Providers may view the consented information prior to accepting the referral, by going to their Client List screen.

As soon as a provider accepts a referral (by changing the status to “Accepted” and clicking FINISH), the following things happen:

- Plan Based Authorizations:
  - The client is copied to the receiving provider’s agency
  - An intake is created with the Forensic (Recovery Works) domain
  - A program enrollment is created

- **NOTE: The client group enrollment will be created once the Authorization has been accepted, but not before.**

Client: Vader, Darth | M159599AV998110 Clear Client

Home Page
Agency
Agency List
Agency Profile
Contacts
Relationships
Announcements
Referrals
Referrals In
Vouchers
Referrals Out
Removed Consents
Deleted Clients
GPRA Discharge Due
GPRA Followup Due
Facility List
Staff List
Tx Team Groups
System Usage
Billing
Contract Management
Alerts Configuration
Group List
Client List

### Referral

Referred By
Agency: SAT Patty
Facility: Patys Facility
Staff Member: Canham, Patty
Program: Patys Facility/Non-ATR : 12/3/2014 -
State Reporting Category: Adult outpatient
Reason: Service not available at this facility
If Other:
Is Consent Verification Required?: Yes
Is Consent Verified?: Yes
Continue This Episode of Care?: No

Referred To
Signed Consents: SAT Patty2
Agency: SAT Patty2
Facility: Facility 01
Staff Member:
Program: Outpatient (I)
State Reporting Category: Adult outpatient
Non-System Agency:
Non-System Modality:
Non-System Specifier:
Appt Date:
Consents Granted
Consent Date: 12/1/2014
Disclosure Domains:
ATR Eligibility Screen (DS, 6/1/2015)
Continuing Care Check Up (DS, 6/1/2015)
Recovery Plan (DS, 6/1/2015)
Recovery Plan Review (DS, 6/1/2015)
Client Information (Profile) (DS, 6/1/2015)

Comments
Referral Status: Referral Created/Pending
Referral Date:
Projected End Date:
Created Date: Placed/Accepted

Cancel Finish

If there is a voucher for this client, the provider will go to the Voucher menu item under the Client's Profile. The Voucher status will be Pending.

The provider clicks on the **Profile** action and "Accepts" the Voucher. They may also decline the Voucher.

User: Canham, Patty | Location: SAT Patty2, Facility 01 Snapshot

**Client:** Vader, Darth | M159599AV998110 Clear Client

Home Page

Agency

Group List

Client List

Client Profile

Alternate Names

Contact Info

Collateral Contacts

Other Numbers

History

Client Group Enrollment

Voucher

Add New Voucher Record

Actions	Auth #	Payor	Status	Effective Date	End Date	Authorized	Encumbered	Expended	Available	Last Activity Date
<span style="background-color: black; color: white; padding: 2px 5px; border-radius: 3px;">Profile</span>	133562		Pending	12/12/2014	6/30/2015	\$352.50	\$0.00	\$0.00	\$352.50	12/17/2014

**Client:** Vader, Darth | M159599AV998110 Clear Client

Voucher

Group Enrollment:

Plan: Corrections PATR

Voucher #: 133562

Administering Agency: SAT Patty

Effective Date: 12/12/2014

End Date: 6/30/2015

Status: Pending

Contract: 2011 - SAT Patty2 / 7/1/2014 - 6/30/2015 - Corrections PATR-Corrections PATR

Date Approved: 12/12/2014

Updated Date: 12/17/2014 5:34 PM

Updated By: Canham, Patty

Comments

Vouched Services List

Service	Authorized Units	Authorization Amt	Encumbered	Expended	Available Units
Residential Treatment	5	\$352.50	\$0.00	\$0.00	\$0.00

Actions

[Accept](#) [Decline](#)

Total Vouched: \$352.50

Total Encumbered: \$0.00

Total Expended: \$0.00

Total Available: \$352.50

Finish

Once the service provider “Accepts” the referred Voucher, they may begin to document encounters for that client for services on that voucher. After documenting the encounter, it can be released for billing to the State (see section E.19)

## Closing an Intake/Episode of Care



To begin, be sure that you have selected a client, since everything you do in the Intake will be applied to the client record chosen. The intake should be closed once all work has been completed for a client.

Click on the **Activity List** link located in the left navigation menu. OR from the Client List, search for the client, and hover your cursor over the Actions pencil icon and click on the **Activity List** link.


1. Hover your cursor over the Actions pencil icon next to the **Intake** item in the Client Activity List. Click on the **Review** link.
2. Enter the desired date in the “Date Closed” field and click on **Save & Close the Case** link.
3. Click the **Finish** button to quit the screen

**Client:** test1, sk | M129767ET767121 | 1 

### Client Activity List

Actions	Activity	Activity Date	Created Date	Status
	Client Information (Profile)	11/11/2015	11/11/2015	Completed
	Intake Transaction	11/11/2015	11/11/2015	Completed

**Review**

Location: skFomesicProvider2, Facility2 

**Client:** test1, sk | M129767ET767121 | 1 

### Intake Case Information

Intake Facility	Facility2	Case #	1
Intake Staff	Kramperth, Scott	Case Status	Open Active
Initial Contact	Other	Initial Contact Date	
Residence	Adams	Intake Date	11/11/2015
Source of Referral	Criminal Justice Provider	Pregnant	No
		Prenatal Treatment	
		HIV Positive	
		Problem Area	
The client has been given a list of providers to choose from? Yes			
Domains		Selected Domains	
		Forensic	
Date Closed		<a href="#">Save &amp; Close the Case</a>	

**Cancel** **Save** **Finish**

# WITS Administrative Functions



## Change Credentials (Password/Pin)

This screen allows you to change your password and pin as needed.

1. Click on the down arrow next to the User field on the WITS header. A Change Credentials box will appear – click on that.
2. The Change Password screen will appear. You will need to enter your current (Old) Password, then enter and confirm a new Password.
3. You will also need to enter your current (Old) Pin, then enter and confirm a new PIN and click Change.
4. You have the option of checking the Show Password/Pin field to enable you to see the new Password and Pin information as you key it. This was done to enable end users to better remember their passwords and PINs.
5. Clicking the Change button will save your password / pin changes

**Note:** Password and Pin are at least 6 characters long and include at least 1 number.

18.1.0

**WITS IN-WITS QA**

User: Canham, Patty Location: another gambling

### Change Password

User Name: pcanham

Old Password 2

New Password

Confirm Password

Old Pin 3

New Pin

Confirm Pin

☐ Show Password/Pin 4

5

## Change Security Question

Security Question is used if end user forgets their password at login. It is initially set the first time an end user logs into WITS.

1. From the WITS login screen – click on the Forgot Password link.
2. You will be asked to enter you User ID, then click the Submit button.
3. You will need to provide the security answer you established the first time you logged into WITS, then click the Submit button.
4. You will be presented with a message that an email with details on how to reset your account is being sent to your email address on file.
5. You will receive an email from [atr2in@witsweb.org](mailto:atr2in@witsweb.org) with a link similar to what is shown. Click on the link to be able to change your security question.

**Login**

User ID  
Password  
Pin  
Login  
**Forgot Password?**

**Forgot Password**

User ID  
pcanham  
Submit

**Forgot Password**

Security Question  
What year did you get married?  
Answer  
Submit

**Email with link that is sent when security question answer is complete and Submit button is clicked**

**IN-WITS QA**  
Web Infrastructure for Treatment Services

**Patty Canham**

As you have requested, a reset credentials link is provided below. If you did not initiate this request, please ignore this link and contact your WITS administrator or supervisor.

<https://in-ga-sts.witsweb.org:443/l.dapPlugin/Reset?token=hDs8pdZpVt0fZpmy0gg%2FCPE9lkdTpJ5MxSaFdngqJCpir%2BbJzICA0Cs560WE36MIYy3x2ULK9f01KL51QRzmpOaGKDUaWm9RxXE9fzvev4L7u09M%2F%2Bgsoee2Khd4ozIT7KqnSnGhaT6NzzdthETjzLmV4lhk8lOloLHCxWRWPPRLVYZiy5vsPnCaJpPdJmMiklandMhJ90RyIO%2FcS%2FnDe4gOg0BQAV18uNgFhXbMjpBjHMGpmIM3guWxpWZajrTju03qZo%2Bm%2FxdnUlpzdIZdf%2BKrcKcm%2Bgo051OY5IMi2mV5CIYVTzLQPHmFFZzPvVng%3D%3D>

6. You will be presented with the Reset Credentials screen. Clicking on the down arrow on the Security Question field will allow you to change your Security Question.
7. You must also change your Password and Pin when changing your Security Question.
8. Click the Save button to have your changes implemented.

**Reset Credentials**

Display Name  
Canham, Patty

Email  
patty.canham@feisystems.com

Security Question  
What year did you get married? 6

Answer  
1987

Password  
Confirm Password 7

Pin  
Confirm Pin

Save 8 ☐ Show Password/Pin

## Reviewing all Vouchers for Your Agency

1. To review all vouchers within the current Agency, you must first select the **Agency > Billing > Authorization List** link located in the Left side navigation.
2. Once you are in the **Voucher Search** screen, you may search using any of the available criteria or filters, or you may simply click the Go button to generate a list of all of the available vouchers within the Agency.
  - Easy to search by client First and Last name, UCN or authorization effective date
  - This screen also helps you to gain an understanding of the monies being spent for these services.
3. The browser window will reload and the voucher list will now appear on the screen with a list of available vouchers. To review any of the vouchers simply hover on the Actions pencil icon and click on the **View** link.
4. Click on the Export link to export the voucher list to an Excel spreadsheet, if needed.
5. Can also generate and print a voucher summary report, if you have the need to give a hard copy of the voucher to the client.

The screenshot shows the 'Voucher Search' and 'Voucher List' interface. Callout 1 points to the 'Authorization List' link in the left navigation menu. Callout 2 points to the search filters in the 'Voucher Search' section. Callout 3 points to the 'View' link in the 'Actions' column of the 'Voucher List' table. Callout 4 points to the 'Go' button. Callout 5 points to the 'Generate Report' link in the top right corner.


**Voucher Search**

Provider Agency: [Dropdown]  
 Administrative Agency: [Dropdown]  
 First Name: [Text]  
 Unique Client Number: [Text]  
 Created on: [Text]  
 Authorization Effective Date: [Text]  
 Authoriz: [Text]

Provider Facility: [Dropdown]  
 Contracting Agency: [Dropdown]  
 Last Name: [Text]  
 Voucher#: [Text]  
 Status: [Dropdown]  
 Payor Plan: Recovery Works [Dropdown]  
 Created By: [Text]

Clear Go

**Voucher List** (Export)

Actions	#	Payor	Provider Agency	Admin Agency	Intake Facility	Client	Effective Date	End Date	Status	Vouched Amt	Encumbered	Expended	Available
 View	567	Recovery Works (Recovery 00667)	FTRW Agency	FTRW Agency		Dancer, Native	11/25/2015	12/25/2015	Active	\$20.00	\$0.00	\$0.00	\$20.00

Dollar Amount

Total Vouched: \$20.00  
 Total Encumbered: \$0.00  
 Total Expended: \$0.00  
 Total Available: \$20.00

Voucher Summary Report generated by clicking on **Generate Report** link.



## Voucher Summary Report

Care Coordinator: FTRW Agency

Date: 11/25/2015

Client Name: Dancer, Native

Client ID: M619577AD738100

Payor Plan: Recovery Works

---

Service Provider: FTRW Agency

Date Accepted: 11/25/2015

Agency Facility Name:

Voucher effective from: 11/25/2015 to 12/25/2015

Status: Active

Service: Doing Stuff here

Vouched Units: 4

Vouched Amount: \$20.00

Avail. Units: 4.00

Avail. Amount: \$20.00

Total Service Provider Voucher Amount: \$20.00

Available Funds Remaining: \$20.00

---

Total Client Amount of Vouchers: \$20.00

Total Funds Remaining: \$20.00

---

Care Coordinator Signature

Date

---

Client Signature

Date

## Agency Review of Claims

Each agency may have a designated person who has accountability for reviewing encounters and releasing them to billing. The WITS Administrator will work with your agency to determine who has the Release to Billing role. The agency staff with the Release to Billing role should review the encounters every day to ensure they are being released to billing in a timely fashion. If encounters are not released to billing they will not get paid by the State.

To determine if there are encounters that are not released:

1. Go to the **Agency > Billing > Encounter List** link from the left navigation, you will be presented with the Encounter Search and Encounter List screen.
2. If you are looking for specific encounters – you can enter that encounter's criteria in the Encounter Search fields and click on the Go button to bring back those encounters that meet those criteria. Hitting the Clear button will clear all the Encounter Search criteria.
3. Review items returned in the Encounter List. You may also click on the (Export) link to export the information to a spreadsheet.
4. Any encounters that are in a status of **Not Released** are candidates to be released to billing (RTB).
5. Use the actions pencil icon to view the profile of the encounter
6. Click on the Release to Billing link in the Administrative Actions to release the encounter to billing.

The screenshot displays the WITS system interface. On the left is a navigation menu with a blue sidebar. A red box highlights the 'Billing' section, and a red arrow points to the 'Encounter List' link. A blue circle with the number '1' is placed over this link. The main area shows the 'Encounter Search' form with fields for Enc ID, First Name, Last Name, Program, Status, Balance, UCN, Rendering Staff, Supervising Staff, SSN, Service Start, Payor Plan, Procedure Code, and Facility. A blue circle with the number '2' is placed over the 'Go' button. Below the search form is the 'Encounter List (Export)' table. A blue circle with the number '3' is placed over the table header. The table has columns: Actions, Enc ID, Client Name, Date, Sec Start, Status, Duration, Procedure, Rend. Staff, Program Name, and Balance. The table contains five rows of data. The row with Enc ID 576 has a status of 'Not Released'. A red box highlights this row, and a blue circle with the number '4' is placed over it. The row with Enc ID 577 also has a status of 'Not Released'. A red box highlights this row, and a blue circle with the number '5' is placed over the pencil icon in the Actions column. The row with Enc ID 571 has a status of 'Released'. A red box highlights this row, and a blue circle with the number '6' is placed over the 'Release to Billing' button in the Administrative Actions section. The bottom section shows the 'Encounter' profile for Enc ID 576, with fields for Service, Program Name, Start Date, End Date, Start Time, End Time, Duration, # of Service Units/Sessions, and Rendering Staff. A blue circle with the number '6' is placed over the 'Release to Billing' button in the Administrative Actions section.

Actions	Enc ID	Client Name	Date	Sec Start	Status	Duration	Procedure	Rend. Staff	Program Name	Balance
	574	Biscuit, Sea	7/1/1980	11/8/2015	Released	300 Min	3070	Canham, Patty	Recovery Works	\$300.00
	575	Biscuit, Sea	7/1/1980	11/12/2015	Released	300 Min	3070	Canham, Patty	Recovery Works	\$150.00
	576	Biscuit, Sea	7/1/1980	11/18/2015	Not Released	300 Min	3070	Canham, Patty	Recovery Works	\$0.00
	577	Biscuit, Sea	7/1/1980	11/20/2015	Not Released	300 Min	3070	Canham, Patty	Recovery Works	\$0.00
	571	Dancer, Native	5/6/1960	11/2/2015	Released	300 Min	3070	Canham, Patty	Recovery Works	\$75.00

Client: Biscuit, Sea | M719078IB878100 | 1 Clear Client

Encounter

ENC ID 576 Created Date 12/10/2015 10:35 AM

Service skNewService7

Program Name Facility1/Recovery Works : 1/1/2015 -

Start Date 11/18/2015 End Date

Start Time 9:00 AM End Time 12:00 PM

Duration 180 Min

# of Service Units/Sessions 15

Rendering Staff Canham, Patty

Notes

Administrative Actions

Release to Billing Delete

## **Claim Batching/Submission/Adjudication**

After encounters are released to billing a **claim item** is automatically created.

For INDIANA WITS, there are automated processes that run daily to automatically batch up the claims and on a weekly basis to bill the batched claims to the State. For Forensic Treatment / Recovery Works, there is also automated process to automatically adjudicate and mark the claim in WITS as paid.

The State then has processes outside of WITS to generate a check/EFT transaction to the provider for claims that are paid.

Late Friday night every week, WITS gathers all of the encounters that have been released to billing and creates a file. Monday-Wednesday, Recovery Works staff adjudicates that file and determines the verdict on any billings that were rejected or pended. On Wednesday at 4:00pm EST, all of the billings that were approved for payment in WITS are submitted and the State's WITS manager creates a file that can be read by the State payment, People Soft. That file is turned in to the Clerk's office for payment on Thursday, and they begin the payment process. Payments are made within 35 days of receipt of the file on Thursday. The process starts all over again the next day.

**Claim Batch Processor** takes all claims in a release status for a particular payer and loads them into a Claim Batch. To view batches:

1. From the left navigation go to **Agency > Billing > Claim Batch List**
2. You will be presented with the **Provider Claim Batch List** screen
3. You can enter search criteria such as Plan (Payor) Name or Created Date and click on the Go button to view Claim Batches that meet that criteria. Or click on the **Clear** button, then the **Go** button to see a list of all Claim Batches.
4. Notice at this point the status of the batch. A Batch Status of **'Billed'** means that the claims have been batched but not yet submitted to the State. A Batch Status of **'Accepted'** means that the Forensic Treatment \ Recovery Works batch has been accepted and paid by the State (indicates that the **Provider Claim Submission Processor** has run).
5. You can then use the Actions pencil icon to view all **Claim Items** in the batch or the **Profile** of the batch. Also have the ability to use the **(Export)** link in the Claim Item List section header to download the claims to a spreadsheet

**Provider Claim Batch List**

Plan Name  Search Date   
 Billing Form  Submit Date   
 Batch #  Status

[Clear](#) [Go](#)

**Claim Batch List (Export)** [Download 837](#)

Actions	Batch #	Status	Batch For	Billing Form	837 Type	Order	Charges	Service Mo/Yr	Created	Transmit
	379	Accepted	skForensic 777	WITS Batch		P	\$60.00		11/16/2015	
	383	Billed	skForensic 777	WITS Batch		P	\$1,125.00		12/10/2015	

[Claim Items](#) [Profile](#)

**Claim Item List for Batch 383 (Export)**

Actions	Claim #	Item #	Client Name	CPT	Status	Auth #	Cost Center	Charge
	558	710	Dancer, Native	3070	Batched	1274		\$75.00
	559	711	Dancer, Native	3070	Batched	1274		\$150.00
	560	713	Dancer, Native	3070	Batched	1274		\$150.00
	561	714	Biscuit, Sea	3070	Batched	1275		\$300.00
	562	715	Biscuit, Sea	3070	Batched	1275		\$150.00

## Reviewing Payments

Once you see that a claim batch has been accepted in the claim batch list – you will want to review the payment information in WITS.

**Claim Batch List (Export)** [Download 837](#)

Actions	Batch #	Status	Batch For	Billing Form	837 Type	Order	Charges	Service Mo/Yr	Created	Transmit
	379	Accepted	skForensic 777	WITS Batch		P	\$60.00		11/16/2015	
	383	Accepted	skForensic 777	WITS Batch		P	\$1,125.00		12/10/2015	

1. To begin, you must first click into the **Agency > Billing** module followed by the **Payment List** link located in the left side navigation.
2. You will be presented with the **Payment Search** screen, which will display any payments.  
To generate a list, enter in your search criteria in the **Payment Search** section and click the **Go** button. Notice that the browser window will reload and the results list will appear in the **Payment List** section of the screen. Here you will be able to see all of the claim batches which have been released to billing and have been paid in WITS.
3. You never need to use the links outlined in red – WITS applies the payments from the State automatically.
4. Next, hover your cursor over the Actions pencil icon and click on the **Profile** link to view a payment profile item.

**1** Click on the **Payment List** link in the left-hand navigation menu.

**2** In the **Payment Search** section, enter the following information:

- Payor Plan: [Dropdown]
- First Name: [Text Box]
- Last Name: [Text Box]
- Pmt #: [Text Box]
- Posted Date: [Text Box]
- Reference: [Text Box]
- Payment Amount: [Text Box]
- Unapplied Amount: [Text Box]
- Contractor: [Dropdown]

**3** Click the **Go** button to view the **Payment List (Export)**.

**4** Click the **Profile** button for the selected payment to view the **Payment Profile**.

**5** Click the **Show Payment Application** link under the **Administrative Actions** section to view the **EOB Transaction List (Export)**.

**Payment List (Export)**

Actions	Pmt #	Payor Name	Posted	Payment Amount	Unapplied Amount	Intended For	Created By
	213	skForensic Contractor2 - 22222	12/10/2015	\$1,125.00	\$0.00		User, System
	209	skForensic Contractor2 - 22222	11/16/2015	\$0.00	\$0.00		User, System
	209	skForensic Contractor2 - 22222	11/16/2015	\$80.00	\$0.00		User, System

Total Payment: \$1,185.00

**Payment Profile**

Payment # 213

Agreement Name skForensic777

Client Name

Transaction Type Payment

Reference 210

Comment

Posted Date 12/10/2015

Receipt Date 12/10/2015

Created Date 12/10/2015 2:44 F

Created By User, System

Payment Amount \$1,125.00

Unapplied Amount \$0.00

Check/EFT Date

Intended For

**EOB Transaction Search**

EOB Transaction Type [Dropdown]

Enc # [Text Box]

First Name [Text Box]

Last Name [Text Box]

Payment # 213

Payor Name [Text Box]

**Administrative Actions**

**Show Payment Application** **Apply Payment**

**EOB Transaction List (Export)**

Actions	Enc #	Client Name	Svc Date	Svc Name	Rendering Staff	Transaction Type	Adjustment Reason	App Amt	App Date	Pmt #	Payor Name
	571	Dancer, Native	11/2/2015	skNewService7	Canham, Patty	Payment		\$75.00	12/10/2015	213	skForensic Contractor2 - 22222
	572	Dancer, Native	11/2/2015	skNewService7	Canham, Patty	Payment		\$150.00	12/10/2015	213	skForensic Contractor2 - 22222
	573	Dancer, Native	11/15/2015	skNewService7	Canham, Patty	Payment		\$150.00	12/10/2015	213	skForensic Contractor2 - 22222
	574	Biscuit, Sea	11/8/2015	skNewService7	Canham, Patty	Payment		\$300.00	12/10/2015	213	skForensic Contractor2 - 22222
	575	Biscuit, Sea	11/12/2015	skNewService7	Canham, Patty	Payment		\$150.00	12/10/2015	213	skForensic Contractor2 - 22222
	576	Biscuit, Sea	11/18/2015	skNewService7	Canham, Patty	Payment		\$225.00	12/10/2015	213	skForensic Contractor2 - 22222
	577	Biscuit, Sea	11/20/2015	skNewService7	Canham, Patty	Payment		\$75.00	12/10/2015	213	skForensic Contractor2 - 22222

- If you click on the **Show Payment Application** Administrative Action, you will be taken to the **EOB List** screen. This displays all the claims associated with this batch payment. Clicking on the **(Export)** link allows you to download the EOB transactions to a spreadsheet.
- In the **EOB Transaction Search** section, you can click on the **Clear** button, then click the **Go** button. This will cause all EOB transactions for all claim batches to appear. Notice how the Adjustment Reason is also listed.

## EOB Transaction Search

EOB Transaction Type

First Name

Payment #

Enc #

Last Name

Payor Name

Clear

Go

6

## EOB Transaction List (Export)

Actions	Enc #	Client Name	Svc Date	Svc Name	Rendering Staff	Transaction Type	Adjustment Reason	App Amt	App Date	Pmt #	Payor Name
	560	newtest7, sk7	11/16/2015	skNewService7	Kramperth, Scott	Payment		\$60.00	11/16/2015	209	skForensic Contractor2 - 22222
	560	newtest7, sk7	11/16/2015	skNewService7	Kramperth, Scott	Other adjustments	Exact duplicate claim/service (Use only with Group Code OA except where state workers' compensation regulations requires CO)	\$60.00	11/16/2015	210	skForensic Contractor2 - 22222
	571	Dancer, Native	11/2/2015	skNewService7	Canham, Patty	Payment		\$75.00	12/10/2015	213	skForensic Contractor2 - 22222
	574	Biscuit, Sea	11/8/2015	skNewService7	Canham, Patty	Payment		\$300.00	12/10/2015	213	skForensic Contractor2 - 22222
	575	Biscuit, Sea	11/12/2015	skNewService7	Canham, Patty	Payment		\$150.00	12/10/2015	213	skForensic Contractor2 - 22222
	573	Dancer, Native	11/15/2015	skNewService7	Canham, Patty	Payment		\$150.00	12/10/2015	213	skForensic Contractor2 - 22222
	576	Biscuit, Sea	11/18/2015	skNewService7	Canham, Patty	Payment		\$225.00	12/10/2015	213	skForensic Contractor2 - 22222
	577	Biscuit, Sea	11/20/2015	skNewService7	Canham, Patty	Payment		\$75.00	12/10/2015	213	skForensic Contractor2 - 22222
	572	Dancer, Native	11/20/2015	skNewService7	Canham, Patty	Payment		\$150.00	12/10/2015	213	skForensic Contractor2 - 22222

Another way to view payment information is by viewing the Billing Transactions.

1. To begin, you must first click into the **Agency > Billing** module followed by the **Billing Transaction List** link located in the left side navigation.
2. You will be presented with the **Billing Transaction Search** screen, which will display any payments.  
To generate a list, enter in your search criteria in the **Billing Transaction Search** section and click the **Go** button. Notice that the browser window will reload and the results list will appear in the **Billing Transaction List** section of the screen. Here you will be able to see all of the payment information related to each individual claim/encounter (not the batch).
3. Notice that there are 2 lines for each claim/encounter – one with a type of **Charge** and one with a Type of **Payment Application**.
4. Clicking on the **Actions** pencil icon allows you to see the **Profile**, **Adjust** and **Billing History** links. The **Billing History** link is helpful in that it shows all billing actions that applied to the charge for the claim/encounter.

**Billing Transaction Search**

Encounter #  Payment #   
 First Name  Last Name   
 Service Start  Posted Date   
 Adjustment Reason  Cost Center   
 Transaction Type

**Clear** **Go**

**Billing Transaction List (Export)**

Actions	Enc #	Svc Date	Client Name	Payer	Posted	Type	Charge	Credit	Post #
	571	11/2/2015	Dancer, Native		12/10/2015	Charge	\$75.00	\$0.00	
	571	11/2/2015	Dancer, Native	skForensicContractor2 - 22222	12/10/2015	Payment Application	\$0.00	\$75.00	213
	574	11/8/2015	Biscuit, Sea		12/10/2015	Charge	\$300.00	\$0.00	
	574	11/8/2015	Biscuit, Sea	skForensicContractor2 - 22222	12/10/2015	Payment Application	\$0.00	\$300.00	213
	575	11/12/2015	Biscuit, Sea		12/10/2015	Charge	\$150.00	\$0.00	
	575	11/12/2015	Biscuit, Sea	skForensicContractor2 - 22222	12/10/2015	Payment Application	\$0.00	\$150.00	213
	573	11/15/2015	Dancer, Native		12/10/2015	Charge	\$150.00	\$0.00	
	573	11/15/2015	Dancer, Native	skForensicContractor2 - 22222	12/10/2015	Payment Application	\$0.00	\$150.00	213
	560	11/16/2015	newService7		11/16/2015	Charge	\$60.00	\$0.00	
	560	11/16/2015	newService7	skForensicContractor2 - 22222	11/16/2015	Payment Application	\$0.00	\$60.00	209

**Profile** **Adjust** **Billing History**

**Billing History for Encounter # 571 - Dancer, Native (M56905AD556100)**

Service skNewService7  
 Service Start 11/2/2015 9:00 AM  
 Service End 11/2/2015 10:00 AM  
 Program Name Facility/Recovery Works : 11/2/2015 -

Encounter Balance: \$0.00  
 Duration: 60 Min  
 # of Sessions: 5  
 Rendering Staff: Canham, Patty

**Claim Item List**

Id #	Plan Name	Order of Benefits	Charge	Claim Item Status	Created Date	Created By
710	skNewForensic777	Primary	\$75.00	Batched	12/10/2015	Canham, Patty

**Billing Transaction List**

Id #	Type/Source	Charge	Credit	Adjustment Reason	Comment	Created Date	Created By
894	Charge	\$75.00	\$0.00			12/10/2015	Canham, Patty
903	Payment Application - skForensicContractor2 - 22222 (Pymt # 213)	\$0.00	\$75.00			12/10/2015	User, System

## Creating an Announcement

1. The Announcement List can be used to post or edit announcements on your home-page for select Agencies to view. To create an announcement, click on the **Announcements** menu item followed by the **Announcement List** link located in the left navigation.
2. Next, to add a new announcement click the **Add New Announcement** link.
3. You will now see the **Announcement** screen appear. Proceed and enter the required data in the fields specified.
4. Click on the **Finish** button when you have entered all of the appropriate information for the announcement. This will take you back to the list screen and where you will see the newly added announcement to the list.

The screenshot displays the DARMHA & WITS user interface. At the top, the user is identified as 'Canham, Patty' and the location as 'FTRW Agency, Facility 01'. Below this, the client information is shown as 'Client: Dancer, Native | M619577AD738100 | 1'. The left navigation menu (callout 1) includes 'Home Page', 'Agency', 'Agency List', 'Agency Profile', 'Contacts', 'Relationships', and 'Announcements'. The 'Announcements' menu item is highlighted. The main content area shows the 'Announcement List' (callout 2) with an 'Add New Announcement' button. Below the list, the 'Announcement' form is displayed (callout 3). The form includes a 'Summary' section with the text 'Send questions on the Forensic Treatment \ Recovery Works process to Shannon Burnett', a 'Details' section with a text area, and a 'Agency Type' dropdown menu. The 'Domains' section shows 'ATR', 'Gambling - IN', and 'SBIRT' as available domains, with 'Forensic' selected. The 'Agency' field is blank. The 'Start Date' is '11/25/2015', the 'End Date' is '1/31/2016', and the 'Priority' is 'High'. The 'Created By' field shows 'Canham, Patty' and the 'Created Date' is '11/25/2015 10:20 AM'. The 'Review' button (callout 5) is located under the 'Actions' column, and the 'Finish' button (callout 4) is at the bottom right of the form.

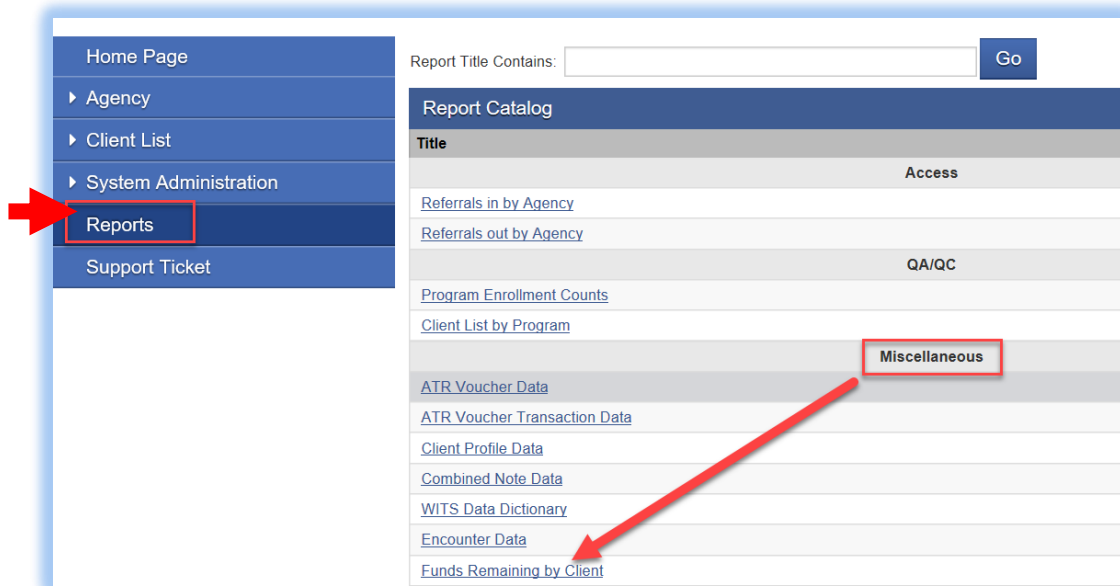
5. To edit or delete the details of an announcement, click the **Review** link under Actions column.

**Tip:** Leaving the Agency Type drop down menu blank will display the message created for all of the agencies. High priority announcements will be displayed in red on the Home Page for users to see.

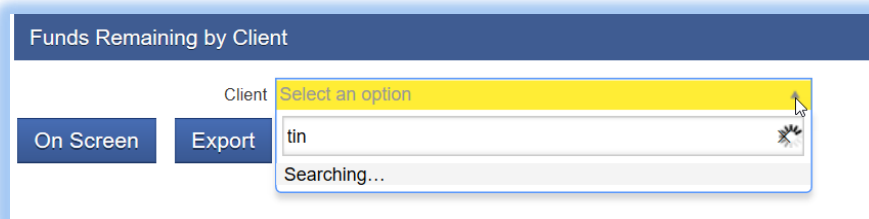
## Funds Remaining by Client

This report has been made available to providers to aid them in their work with clients. The goal of the report is to indicate state funds remaining for the client, no matter which agency services had been received. To access the report, the provider has to have a WITS report security role. That can be obtained from your WITS Administrator.

1. Click on the “Reports” option from the left navigation.
2. Click on the [Funds Remaining by Client](#) link under the Miscellaneous report section.



3. You will be presented with the Funds Remaining by Client report screen. In the client field you can enter either part of the client name or their UCN (full or partial). The client has to exist in your agency for the search to work. The system will present back a list of clients in your agency that meet that criteria. In this example “Tin” was entered for client “Tinker Bell”. Select the client you want and click the “On Screen” or “Export” button.



4. Clicking the “On Screen” button causes the following report to appear for the client you selected.

**WITS Indiana Training** 18.38.0 | RW-Southwestern Behavioral Healthcare, Inc, Southwestern Behavioral Healthcare, | Canham, Patty | Logout

Home Page | Agency | Client List | System Administration | **Reports** | Support Ticket

**Export** **Finish**

**Funds Remaining by Client**

Purpose: This report shows the funds used and remaining for each client.

Report Criteria

Client: Bell, Tinker F259322E8228100

Payor Plan (Authorization Period)	Client Cap Amount	Vouched	Encumbered	Expended	Funds Remaining (Cap Amount - Vouched Amount)
Recovery Works ( 07/01/2014 - 06/30/2015 )	\$1,200.00				
Recovery Works ( 07/01/2015 - 06/30/2016 )	\$1,800.00				
Recovery Works ( 11/01/2015 - 12/31/2019 )	\$1,000.00				
Recovery Works ( 07/01/2016 - 06/30/2017 )	\$7,500.00				
Recovery Works ( 07/01/2017 - 06/30/2018 )	\$7,500.00	\$684.92	\$0.00	\$0.00	\$6,815.08
Recovery Works ( 07/01/2018 - 06/30/2019 )	\$7,500.00	\$419.24	\$0.00	\$0.00	\$7,080.76

## 5. Report Columns and Content

Report Column	Content
Payor Plan (Authorization Period)	The name of the payor plan (e.g. Recovery Works or Gambling) and the authorization period for services
Client Cap Amount	Amount set by the state – this is the maximum amount that can be funded by the state. If the state has worked with the provider to increase that amount for a specific client, then that specific client cap amount will appear in this column.
Vouched	Total amount of monies that have been placed in WITS vouchers for the context client for all agencies. This includes monies for the context agency as well as any other agencies where the client resides.
Encumbered	Total amount of monies in WITS for this client for all agencies that have been released to billing but not yet expended (e.g. processed\adjudicated by the state).
Expended	Total amount of monies in WITS for this client for all agencies that have been expended (e.g. processed\adjudicated by the state).
Funds Remaining	Total monies remaining that can be spent on this client. Calculated by subtracting the vouched amount from the Client Cap Amount

- Provider also has the option to export this information to a spreadsheet by clicking on the “Export” button or clicking on the “Finish” button to return to the Reports menu screen.

# Glossary



**Indiana WITS** is an internet based data collection and reporting system sponsored by the State of Indiana.

**Top Navigation Bar:** This area located at the top of the Indiana WITS screen and contains information that helps the user know his/her current context in the system.

The information includes:

1. **User** (the person currently logged in the system)
2. **Location** (the Agency and Facility currently selected)
3. **Client** (the client profile and data currently selected).

18.1.0

**WITS IN-WITS QA**

User: Canham, Patty | Location: another gambling prov agecny, gam

**1**

**Client:** Ager, Teen | M779975GA689100 [Clear Client](#)

**2**

**Profile**

**3**

First Name: Teen  
Middle Name:   
Last Name: Ager  
Mother's Maiden Name:   
Suffix:   
Gender: Male  
DOB: 7/7/1999  
SSN: 203-92-8765  
DARMHA Client ID:   
Unique Client Number: M779975GA689100  
State Client ID:   
Record Created By: Conrad, Jennifer  
Last Updated By: User, System  
Created Date: 7/8/2015 5:50 PM  
Last Updated Date: 10/8/2015 4:37 PM  
Zip Code:   
Driver's License:   
Medicaid #:   
Has paper file: Yes


Home Page  
Agency  
Client List  
Client Profile  
Alternate Names  
Additional Information  
Contact Info  
Collateral Contacts  
Other Numbers  
History  
Client Group Enrollment  
Voucher  
Allergies  
Linked Consents  
Activity List  
Episode List  
System Administration  
Reports  
Support Ticket

Administrative Actions



Cancel Save Finish

4. **Left Navigation:** WITS has been intelligently designed to follow common behavioral health treatment and recovery service work flows. As a result, when using the left navigation, you will immediately note that most of the modules and screens have been logically organized in a manner which makes sense to clinical staff, case managers and administrators.
5. **Navigating:** Users can easily select where they want to start working by clicking into any of the key modules and screens for instant access. Selections on the Left Navigation will have the font change from white to black.

18.1.0


**IN-WITS QA**

User: Canham, Patty ▾ | Location: another gambling prov agecny, gam ✎


 **Client:** Ager, Teen | M779975GA689100  Clear Client

4


5

Home Page  
 ▶ Agency  
 ▼ Client List  
   ▼ Client Profile  
     Alternate Names  
     Additional Information  
     Contact Info  
     Collateral Contacts  
     Other Numbers  
     History  
     Client Group Enrollment  
     Voucher  
     Allergies  
     Linked Consents  
   ▶ Activity List  
     Episode List  
 ▶ System Administration  
 Reports  
 Support Ticket

**Profile**

First Name	Teen	DARMHA Client ID	
Middle Name		Unique Client Number	M779975GA689100
Last Name	Ager	State Client ID	
Mother's Maiden Name		Record Created By	Conrad, Jennifer
Suffix		Last Updated By	User, System
Gender	Male ▾	Created Date	7/8/2015 5:50 PM
DOB	7/7/1999 	Last Updated Date	10/8/2015 4:37 PM
SSN	203-92-8765		
		<a href="#">Zip Code</a>	
Driver's License			
Medicaid #			
Has paper file	Yes ▾		

**Administrative Actions**

Cancel Save Finish 

6. **Main Content/Results Area:** The main area of the screen will constantly change as you progress through your workflow. It is also the area which will display system and client information, as well as allow you to enter data.
7. **Section Headers:** WITS often contains screens which are comprised of several sections. Therefore, to make it easy to navigate the page, section headers have been provided for clear identification.
8. **Function Links:** If the screen you are in allows you to perform certain functions, such as adding a client, reviewing data, exporting data etc., the functions will usually appear in the section headers as white underlined links.
9. **Action Buttons:** As you enter data and navigate between screens, you will be given various options such as Save, Clear, Cancel, Go, and Finish, all indicated by easy to view buttons.

Client: Ager, Teen | M779975GA689100 Clear Client

7

6

9

8

7

8

7

**Profile**

First Name: Teen  
 Middle Name:   
 Last Name: Ager  
 Mother's Maiden Name:   
 Suffix:   
 Gender: Male  
 DOB: 7/7/1999  
 SSN: 203-92-8765  
 Driver's License:   
 Medicaid #:   
 Has paper file: Yes

DARMHA Client ID:   
 Unique Client Number: M779975GA689100  
 State Client ID:   
 Record Created By: Conrad, Jennifer  
 Last Updated By: User, System  
 Created Date: 7/8/2015 5:50 PM  
 Last Updated Date: 10/8/2015 4:37 PM  
 Zip Code:

Administrative Actions:   
 Cancel Save Finish

**Alternate Names** Add

Actions	Last Name	First Name	Middle Name	Client Alias Type

**Addresses** Add

Actions	Address Type	Address	Confidential	Created	Updated
	Client Home	123 baltimore, IN 98172	No	7/8/2015	7/8/2015

**10. Input Fields/Selection Boxes:** The main content area is the location where the user will enter data into fields, selection boxes, drop-down lists etc. Keep in mind that some fields may be required by your WITS application and will be indicated as such by a Dark Yellow color.

**11. Lists:** When arriving at a screen, users will most likely first see data and information presented as lists. These lists will display available information in columns of different data types which will correspond to the Client, Agency, Facility, Staff, etc., currently selected. In addition, some lists may have an “Action” column offering functions which can be applied to a selection from the list.

[Home Page](#)
[Agency](#)
[Client List](#)

[Client Profile](#)
[Linked Consents](#)
[Activity List](#)
[Episode List](#)

[System Administration](#)
[Reports](#)
[Support Ticket](#)

The filter you created has been applied to the client list.

Client Search

Agencyanother gambling prov agecny

First Name

SSN

IN-WITS QA Client Id

Unique Client Number

Treatment Staff

Case StatusAll Clients

Other Number

Include Only Active ConsentsYes

Facility

Last Name

DOB

Provider Client ID

Primary Care Staff

Intake Staff

Number Type

Clear






Go

Client List [Export](#)





[Add Client](#)

Actions	Unique Client #	Full Name	DOB	SSN	Gender
	M65922221587100	1, phase 2 test	6/5/1972	323-55-8252	Male
	U11915054249100	4520, M	1/1/1991	333-22-4520	Not Known
	M11915655359101	5536, M	1/1/1991	333-82-5536	Male
	M38924056127100	6522, client	3/8/1972	325-63-2410	Male
	M11915557079101	7505, M	11/1/1991	333-22-7505	Male
	M779975GA689100	Ager, Teen	7/7/1999	203-92-8765	Male

### Data Field Conventions:

	Mandatory field, MUST have data in order to save record
	Read Only, system generated field, for display only & cannot be edited
	Discretionary field, will not affect completion or saving of record
	Required missing field, enter data before trying to Save or Finish
	Required for State Reporting; record may be saved but will not be complete if these are empty

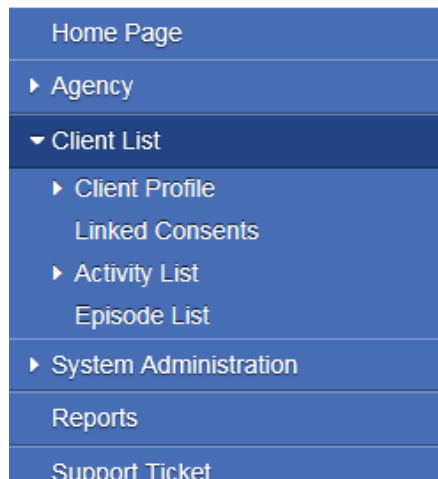
### System Icons:

	Required fields are missing data, the record cannot be updated until data is entered.
	Warning, data has been entered which falls outside of a certain parameter. The record can be updated but you have been warned.
	This application is designed for Microsoft Internet Explorer version 10.0 or higher. Make sure all Windows patches and updates are applied.
	System generated Informational messages usually informing you of a pending task or event needing attention.











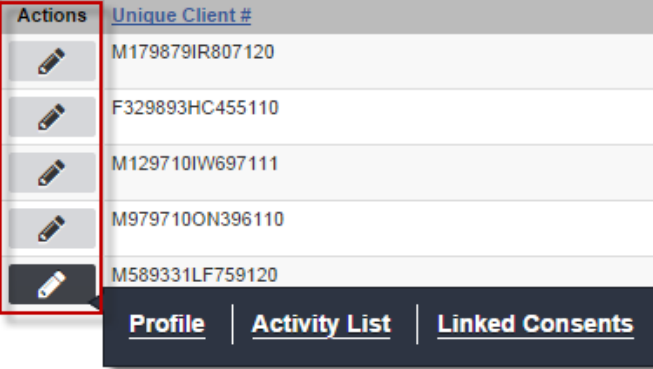
### Site Navigation:

*Client List > Client Profile*

The above convention is used throughout this document to show the Navigation path needed to access the module. Each > indicates a level down from the previous in the left Navigation menu. Below is a screen shot of the left Navigation menu in WITS.



## Actions:

	Cancels the current action and returns you to the previous page.
	Saves data entered and remains on the current page.
	Saves data entered and returns you to the section start page.
	Navigate through the pages\screens in each section.
	Clears all criteria from the search tools when present.
	Run the search tool using the criteria entered.
  	<p>A blue line under a field means you can do something with that field.</p> <ul style="list-style-type: none"> <li>Column headings – can click the column heading to sort the table alphanumerically from 1-Z and then Z-1.</li> <li>Administrative actions – can click on the administrative action to initiate that page \ screen.</li> </ul>
	Move data from one choice box to another.
 	On list screens, can hover over an Actions pencil icon that will allow you to navigate quickly to screens associated to items in that list.

